KABA®

E-Plex® Enterprise Software (Version 2) User Guide

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1 About the E-Plex Enterprise

The **E-Plex lock series** that can be operated by the Enterprise software system are:

E3200, E5200 & E5200 SAC (Standalone Access Controller)**:**

PIN based Single credential locks,

E3700, E5700, & E5700 SAC

PIN & Prox card based (125 KHz RFID) Dual credential locks,

E3600, E5600, & E5600 SAC:

PIN & Smart card based (ISO 14443A/B 13.56 MHz RFID) Dual credential locks.

The E5x00 lock series are “standard” door locks for regular doors and the E3x00 lock series are the “narrow stile” locks, which are designed to be installed typically on a narrow door frame, such as the frame encompassing an aluminum glass door.

Each above lock model is designed to control entry or access to an area or premises through one or more of three ways, depending of the model -> by PIN only access, by presentation of a Prox or a Smart ID card (contactless), or by PIN followed by the presentation of the ID card.

The contactless **Prox RFID** card must be an HID compatible card with its card number data format ranging between the “Standard” Wiegand 26 bits, and from the non-standard 27 through 84 bits. The Enterprise software is designed to read the Card Number (Facility code + card ID) of the Prox card if it is a standard 26 bit wiegand format card.

The contactless **Smart RFID** card can be either, an industry standard (i) a Mifare card, (ii) a DESFire card, or (ii) an HID iClass card. The Enterprise software is designed to read only the Card Serial Number (CSN) of the Mifare and the DESFire cards, and only the unique ID of the HID iClass card contained within its application ID field.

The above different lock models are designed to work in conjunction with the E-Plex Enterprise system software along with the use of a mini Laptop (Netbook) PC with an IrDa (Infra-Red) communications interface to program and audit the lock. You can also use the

same laptop where the main Enterprise applications software is installed to do the lock programming and auditing functions, instead of a separate Netbook PC.

"LearnLok" Option: All card ID based lock series such as the E3600, E3700, E5600, E5600 SAC, E5700 and E5700 SAC can also be used without the Enterprise software, if desired by programming it right at the lock's keypad using Kaba's patented "LearnLok" feature.

No PPC Support for M-Unit: *In the first release of the Enterprise software (Version 1.x), a Windows Mobile OS compatible Pocket PC (PPC) was also supported to function as an M-Unit device. But since the PPC manufacturers stopped making PPCs with built-in IrDA interface (needed to program & audit E-Plex locks), support for PPC as an M-Unit is no longer available from Kaba in the E-Plex Enterprise 2.x software and beyond.*

Note 1: From now on in this manual*, when we refer to a "card", it means either a Prox based token or a Smart card based token such as Mifare, DESFire or iClass.*

Note 2: *Also, from now on the mini Laptop/Netbook PC that is used as a lock programming & auditing device will be referred to as the M-Unit (Maintenance Unit) because its primary function is to perform lock <-> PC data transfer maintenance.*

The items explained in this chapter include the following:

System Components

System Definitions

The E-Plex Enterprise Software Package

System Components

The E-Plex Enterprise system contains the following system components:

- E-Plex Enterprise compliant locks and controllers: E3200, E3600, E3700, E5200, E5200 SAC, E5600, E5600 SAC, E5700 and E5700 SAC.
- For Prox card based locks: HID compliant Prox card tokens (125 KHz RFID) and a Prox card enroller
- For Smart card based locks: Smart card compliant tokens (13.56 MHz RFID) and a Smart card enroller
- Microsoft OS compatible PC running the E-Plex Enterprise system software
- Mini Laptop / Netbook portable PC to run E-Plex Enterprise M-Unit software; the M-Unit device will be capable communicating with the lock via Kaba's IrDa Communications Interface kit.

E-Plex "Enterprise" Locks

The above mentioned E-Plex Enterprise compliant locks can be operated by the Enterprise software. The standalone battery operated lock will grant access if an authorized user presents one of the three valid credentials at the lock front housing: PIN only, or Card only or PIN followed by Card. The lock can store up to 3,000 unique users who can be mix of regular Access users, Manager users, Guest users, Service users and M-Unit users. There is one (and only one) global Master User per lock. The lock can store the last 30,000 transactions (audited events) in the lock's memory.

Lock Modes

You can access the E-Plex lock by one of the following four modes at a given time:

Default Factory Mode – The lock is shipped from the factory in Default Factory Mode with a default factory Master PIN. In this mode, the lock can only be opened with the Default Factory Master User PIN of "12345678" and no other PIN or Card credential will be recognized by the lock as valid.

Access Mode by "LearnLok" – This mode refers to the lock that is operational for user access after the factory default Master PIN of 12345678 is changed to something else. When the lock enters the LearnLok Access Mode, the Master (and Manager users) can add or delete regular users in the lock simply by entering relevant command codes at the lock keypad. Please refer to the "***E-Plex Card Based 36xx/37xx/56xx/57xx Lock Series Operations Manual***" for details.

Access Mode by Software – This mode refers to a lock that is operational for user access after it is programmed by the M-Unit with its lock/user configuration data downloaded from the E-Plex Enterprise system software. When the lock enters the Software Access Mode, the method of lock access is either by, (i) PIN only, or by (ii) Card only, or by (iii) PIN followed by the associated Card. Note: The Service users can have PIN only access any time and no cards are associated with them.

Pushbutton Programming Mode – This mode is typically used to program or audit the lock using the M-Unit handheld device. In this mode, the Master User, or the Manager(s), or the M-Unit User(s) can enter one or more command sequences to program and configure the lock, or download the lock audits.

For more information about using the lock in these modes, refer to **States of the Lock** in Chapter 4, **Operating the E-Plex Lock at its Keypad**.

Lock Access Methods

You can open a lock using one of the following three access credential methods. For Service users only, the access method is by PIN only access; for the rest of the User types, it can be either PIN only, or Card only or PIN & Card access, depending on the specific Access Schedule set during that time. You can set up the lock with specific access schedules for each day, for example PIN only access during morning shift; PIN & Card access during evening shift etc so as to require different access credential methods for users.

PIN Only

Only entering of a valid PIN (Personal Identity Number) is required to access the lock.

Important: The global user PIN length is configurable from 4 to 8 digits, but the first 4 digits *must be* unique for security reasons.

Card Only

Only the presentation of a valid Card is required to access the lock.

PIN and Card

The entry of a valid PIN followed by the presentation of a valid associated ID Card is required to access the lock. The access method through PIN and Card is referred to as “Dual Credential” access.

PINs, Tokens and Token/Card Enrollers

An authorized E-Plex Enterprise system Operator must enroll all users in the system database who need to access the E-Plex locks in the facility. The operator must enter the name etc for each enrolled user and assign a PIN which is automatically generated by the system but can be modified manually by the operator. Additionally, the operator must also enroll a valid token for the user if s/he will require access to a token based lock such as an E3600, E3700, E5600, E3600 SAC, E5700 and/or an E3700 SAC. This is done by using a Card Enroller/Reader – there is one specific model to enroll Prox ID based tokens and another specific model for Smart ID based tokens, depending on your lock models in your facility.

Important: In a few cases where your facility is migrating from one token (and lock) type to another type, for example, from legacy Prox cards to more secure Mifare/DESFire/iClass Smart cards, you will need to use both types of card Enrollers with the Enterprise software system until the migration from legacy to new cards (and locks) is complete.

The enroller is connected to the PC via the USB port interface. The enroller simply reads the card ID data from the token and this ID is assigned to this user in the system. Both enrollers are read-only type enroller and so no writing is performed on the card.

Token Types: ***For Prox-> Card, Tag or FOB; For Smart-> Card, Tag or Key***

The user ID tokens that can be used in the applicable E-Plex locks come in various forms as shown below. It can be either in a “card” form, or in a “FOB” form that can be carried in a key-ring. It can be also in the form of a 25 cent coin (mini disc) called a “Tag”; this can be can be affixed to an existing non Prox or non Smartcard ID badge of a user with picture so as to work in the E-Plex card locks.

HID Prox compliant Tokens

Smart compliant Tokens (Ex: iClass)

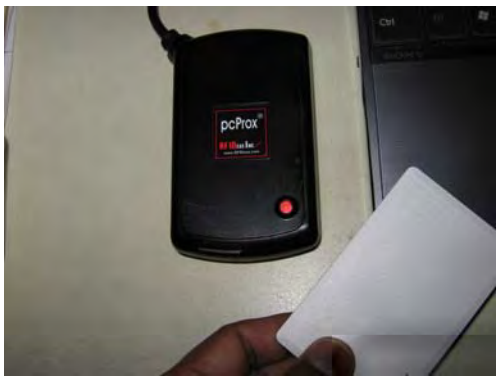
The use of a Prox enroller for Prox token based locks and a Smart card enroller for Smart token based locks are mandatory (see below) for all token based E-Plex locks. As specified earlier, the Smart token or card can be either a Mifare, or a DESFire or an iClass.

The enroller only reads, either (i) the pre-encoded Prox user card number data from the token, or (ii) the pre-encoded Smart user card Card Serial Number (CSN) data from the token and stores it the system software. An authorized user with a valid ID (the above enrolled user ID) will be granted access in all the programmed Prox card and/or Smart card based lock(s) in the facility. The following two pictures show the Prox and the Smart token enrollers that are used in the E-Plex Enterprise system with their USB connectors.

“RFIdeas” HID Prox compliant Enroller

“RFIdeas” Smartcard compliant Enroller

For the reading (enrolling) of a token, you just need to place the token on top of the enroller for a second or so. The small red light on the enroller will turn green momentarily indicating a successful read. The ID data will be read by the enroller and transferred to the E-Plex Enterprise and stored in the database instantly. The example shown here is for the Prox token enroller; it will be the same procedure for the Smart token based enroller.



E-Plex Enterprise Software (Server and Client modules)

The E-Plex Enterprise software when installed allows you to manage your door locks and the associated user data from one standalone PC. It also offers auditing and reporting capabilities. The software consists of the “Server” and the “Client” parts/modules which can both be installed on a single Standalone PC along with the SQL server database.

Optionally, you can install the server related modules and the SQL database on a separate Server PC only, and then install the Client related modules on one or more individual Client PCs in a networked configuration. In this networked configuration, you must have the right card enroller connected to each client PCs if you use card/token based E-Plex locks.

Portable PC M-Unit (Netbook/Laptop) and PC M-Unit Software

The E-Plex “universal” PC M-Unit software is installed on either, (i) the same PC where the main Enterprise applications software is installed or (ii) on a separate mini Laptop / Netbook PC. In either case, the M-Unit software will work in conjunction with ***Kaba’s PC M-Unit IrDa Communications Kit*** to program and audit the locks.

This portable PC M-Unit device, in addition to letting you program and audit the lock, allows for the downloading of Users/Locks configuration data from the PC to the M-Unit, and also the uploading of the lock audits data from the M-Unit back to the PC for Reports at the PC.

System Definitions

This section contains system definitions for the following items:

PC System Operator Classifications

Door Groups and Doors

Access Schedules

Holidays/Vacations

Access Groups

Lock User Personnel Classifications (Departments & Users)

PC System Operator Classifications

- Three types of operators can use and operate the E-Plex Enterprise software:

Level 1 Operator – The software system can have up to 10 Level 1 Operators. The global Master user of the system will automatically become the very first Level 1 Operator. All Level 1 Operators will have the highest system authorization and will have access to all operational functions of the E-Plex Enterprise software. Any Manager user can also be assigned as Level 1 Operator (or as Level 2 but not as Level 3).

The Level 1 Operator can add Level 2 or Level 3 Operators to the Enterprise system. The Level 1 Operator can add a maximum of 255 Level 2 and Level 3 Operators combined to the system. When a Level 2 or Level 3 Operator is added to the system, this Operator's Logon Name and Password must also be established.

Level 2 Operator – Can be a maximum of 255. Level 2 Operators can perform all functions of Level 1 Operators, with the exception of the following:

- Adding, modifying, or deleting any other operators
- Adding, modifying, or deleting any managers
- Modifying the site's software "Private ID"
- Will not be able to view any user's access PIN

Level 3 Operator – Can be a maximum of 255. Level 3 Operators can be M-Unit and/or Access users only and can perform all functions of Level 1 Operators, with the exception of the following:

- Adding, modifying, or deleting any other operators
- Adding, modifying, or deleting any managers
- Modifying the site's software "Private ID"
- Will not be able to view any user's access PIN
- Cannot perform a system database restore operation
- Can only change her/his own Password in the *System Setup.*

Note 1: An M-Unit user can be assigned only as a Level 3 Operator; this user cannot login to the E-Plex Enterprise (Client) software but can login to the PC M-Unit software to program/audit locks.

Note 2: An Access user can be only a Level 3 Operator; s/he can login to the Enterprise software but cannot perform any M-Unit software functions to program/audit locks.

Note 3: The Guest and Service users cannot be assigned any Operator status – Level 3, 2 or 1.

Door Groups & Doors

You can define up to a maximum combination of 10,000 door groups and doors in the system database. A door group represents a group of physical doors that contain the E-Plex locks operated by the Enterprise system. For example you can have a couple of door groups called "DG-Factory" and "DG-Offices", each containing many doors (locks) belonging to them.

In each door group, you must assign one (and only one) Door Group (DG) Manager user. However you can assign many regular Manager users to each door group. The DG Manager will have complete access to all the doors in this door group without any restrictions. This is very similar to the global Master user having complete access to all the door groups and

doors in the facility, the difference here being that this DG Manager will have complete access only to her/his doors in this door group rather than the doors in the entire facility.

Access Schedules

You can define an unlimited amount of access schedules in the system database. However, you can define only up to 16 access schedules in a lock. When assigning access schedules to a user, you may only use the access schedules that have been assigned to the lock. There is a default access schedule, “Always” (24 hours per day, seven days per week), that is built into the system software and cannot be changed or deleted.

An access schedule is a defined time period during the span of a week during which users are granted access to a door. Operators using the E-Plex Enterprise software at the PC define the access schedules by selecting the days of the week that the schedule is active and by specifying the schedule’s start time and end time for the days specified. You can define a descriptive schedule name for each access schedule. Once defined, you can assign access schedules to a door with what credential type to use (PIN, card or PIN & card) during that schedule in the **Manage Doors** menu of the software dialog. A maximum of 16 access schedules can be assigned to a single door.

Because you may specify whether the door access credential method is either PIN only, Card only or PIN followed by Card, the different access schedules in the system cannot overlap.

If you have a need for periods of time where access for certain groups of users overlaps partially, you will need to break those time periods into separate access schedules. Also, an access schedule cannot bridge a time period between two consecutive days. If you have an access schedule that needs to start before midnight and end after midnight, you must set this up as two separate access schedules.

Example

During the week, say you have three shifts at your company:

First Shift – 7:00 a.m. to 3:00 p.m.

Second Shift – 2:00 p.m. to 11:00 p.m.

Third Shift – 10:00 p.m. to 8:00 a.m.

These three shifts will need to be broken into seven access schedules so they do not overlap:

7:00 a.m. to 2:00 p.m. – First shift

2:00 p.m. to 3:00 p.m. – First and second shift overlap

3:00 p.m. to 10:00 p.m. – Second shift

10:00 p.m. to 11:00 p.m.– Second and third shift overlap

11:00 p.m. to 12:00 a.m. – First part of third shift (first day)

12:00 a.m. to 7:00 a.m. – Second part of third shift (next day)

7:00 a.m. to 8:00 a.m. – Third and first shift overlap

By default, all user types (except the global Master user) are not assigned any access to the lock. These user types include the Manager users, the Access users, the Guest users and the Service users. One or more of the access schedules must be assigned to these user types who must have access to the affected doors/locks .

Choose from access schedules that have been previously defined for the door, which means that the maximum number of access schedules that can be assigned to a user for a particular door is the number of access schedules defined for the door, up to 16.

Holidays/Vacations

You can define an unlimited amount of holidays/vacations in the system database. However, you can define only up to 32 holidays/vacations in a lock.

A holiday/vacation template is a defined time period during which users will NOT be granted access to a door. By default, there will be no access allowed to a door/lock during a defined holiday/vacation period, except for the global Master user and all Manager user(s) of the system. The Access, Guest and Service Users who are assigned a "privilege" in the software to override the holidays/vacations will also have access during the holiday/vacation period.

Access Groups

An Access Group is setup when you define a collection of doors WITH an Access Schedule assigned AND an access credential method during this schedule (PIN only, card only or PIN & card access) to each one of these doors. This makes it easy when the operator wants to add a new user in the system database that should have access to many doors at various schedules very quickly, saving enormous keyboard entry time.

Lock User Personnel Classifications – Departments & Users

- In addition to the Master, up to five different types of users can perform various operations at the lock:

Master User – The Master User is the top-level user who performs the initial lock setup activities and can program all lock functions. There is only one (global) Master User per facility (all door groups and all doors) whose credential will be accepted in all locks in the entire facility. The Master User is the only user who has "Always" access to any lock, and has all the access privileges all the time and cannot be locked out. The global Master user's credential acts just like an emergency mechanical override key The Master User's PIN is always eight digits in length.

Manager & Door Group (DG) Manager Users – A regular Manager User is a second-tier administrator who can program most of the lock functions as the Master user and these are specified in the Error! Reference source not found. table in Chapter 4, Error! Reference source not found. **at its Keypad**. Each lock can have up to 3,000 Manager Users.

The Door Group (DG) Manager on the other hand is just like the global Master user, except that her/his credential is always valid without any restrictions only in the doors belonging to her/his Door Group. All locks/doors belonging to a Door Group must contain one and only one Door Group (DG) Manager, though you can have multiple regular Manager users in the same door group.

Access User – An Access User has only the ability to open locks. Each lock may have up to 3,000 Access Users and these are considered permanent users.

Guest – A Guest user is just like an Access user, except the maximum expiry for a Guest user is one year. Each lock may have up to 3,000 Guest Users, which are temporary and last between 1 day and 365 days (1 year).

Service User – The Service user's credential is always PIN only. A Service User has authorization any time of day to a lock for a specified period of time -> either one-time entry ("one shot") only; or from 1 hour to 96 hours access only from the first time s/he presents the credential; or can have access with no expiry like a regular user, thus enabling the service user to gain entry just with PIN access, even during a card only or PIN & card schedule period in the lock.

M-Unit User – An M-Unit User does not have access to open any locks. The M-Unit User can only perform maintenance on locks using the M-Unit handheld, as well as any lock programming and auditing. Each lock may have up to 3,000 M-Unit Users.

Note: *All of the user types, including Manager Users, can have one or all of the following three privileges:*

- *Override holidays/vacations*
- *Override deadbolt privacy*
- *First entry passage authorization*

The E-Plex Enterprise Software Packages

There are three (3) software packages/kits available from Kaba to be used with the E-Plex Enterprise system as described below:

(1) ***Kit #1: E-Plex Enterprise Software CD Kit***

This kit includes the following items:

a. *E-Plex Enterprise Software* installation CD.

b. E-Plex Enterprise Getting Started Sheet.

c. *E-Plex Enterprise Software User Guide* (this guide) in electronic form on the CD.

(2) ***Kit #2: E-Plex Enterprise Implementation Kit***

- This package combines the *E-Plex Enterprise Software CD Kit* (***Kit #1*** above) and the *E-Plex PC M-Unit Communications Kit* (***Kit #3*** below).
- Kit #2 is the only kit you will need to run the Enterprise software system in your facility. You need this whether your PC M-Unit part of software module runs on the same laptop PC where the main Enterprise applications software is also running or that you are planning to use a dedicated/separate Netbook/Min laptop PC to run the PC M-Unit software.

(3) ***Kit #3: E-Plex PC M-Unit Communications Kit***

A Laptop or a Netbook PC does not have a built-in IrDA interface. This kit will provide that interface when connected to the M-Unit PC's USB port to "talk" to the lock via IrDa communications. This kit includes the following items:

- A USB Flash drive, pre-loaded with the *PC M-Unit Software* and the *PC M-Unit User Guide.*
- *E-Plex PC M-Unit Getting Started Sheet.*
- An IrDA-to-USB adapter and a USB extension cable.

USB Flash Drive with M-Unit Software

IrDA Adapter with extension Cable

2 Getting Started

The contents of this chapter are intended to assist you with installing and setting up your E-Plex Enterprise system software.

The items explained in this chapter include the following:

- System Requirements
- Software Installation (via ***Appendix***) and Basic System Setup
- Main Menu and Toolbar

E-Plex Enterprise System Requirements

PC & OS Requirements

Standalone PC (for "Express" Install)

- MS Window's compatible PC with minimum Pentium-III 500+MHz processor
- Minimum 1 GB of RAM.
- Minimum of 4 GB of free hard disc space when using smaller SQL database
- SVGA Monitor with minimum resolution of 1024 x 768
- CD-ROM drive for software installation
- Minimum of 2 USB ports in PC to connect the Prox Enroller and the M-Unit PDA
- One of the Microsoft Operating Systems below:
    - MS Windows XP Professional (SP 3 or higher),
    - MS Windows VISTA Home Premium or Business – 32 or 64 bit versions, or
    - MS Windows 7 Premium or higher – 32 or 64 bit versions
- MS SQL Express 2005 (SP3 or higher) – supplied with Enterprise software

Networked PCs (for "Custom" Install)

- **Client PC**: Same requirements as Stand Alone PC above, except the MS SQL
- **Server PC**: Same requirements as Stand Alone above, except
    - Recommended 2+GB of RAM when using larger SQL database
    - Recommended 10+GB free hard disc space for larger SQL database
    - MS Windows Server 2003 & 2008 OS (if not using XP, VISTA or Windows 7)

Maintenance Unit (M-Unit) Requirements

- **Standard Laptop PC**: Same requirements as Standalone PC above, or
- **Mini Laptop (Netbook) PC**: Microsoft XP Home or higher OS and minimum 1MB of RAM, minimum 1024 x 600 screen resolution, 4GB of storage memory (flash or hard-drive), 1 available USB port. Optionally, wired or wireless LAN interface for network communications via IP address to host PC

Note: Either of the above M-Unit PCs requires Kaba's ***E-Plex PC M-Unit Communications Kit*** as an accessory containing a USB Flash drive with PC M-Unit program pre-loaded & a USB>IrDa adaptor for PC <->Lock communications.

Card Enroller Requirement *(*Mandatory* for card based E-Plex locks)*

- **RFIDeas pcProx** [RDR-6018KU, or BSE-PCPRX-U] 125 KHz HID Prox token Enroller with USB interface – to be used with E37xx and E57xx Prox card lock series, or/and
- **RFIdeas AIR ID** [RDR-7082AKU-KA] 13.56 MHz Smart token (Mifare, DESFire or iClass) Enroller with USB interface – to be used with E36xx & E56xx Smartcard lock series.

Basic System Setup & Quick Start Tips

Complete the following steps in this order prior to setting up the system for use:

Note: In this example, it is assumed that you will be using one standalone laptop to run the E-Plex Enterprise Server/Client applications software, and again use the same laptop to operate it as a portable M-Unit device to program/audit locks.

1. The actual **Software Installation section** is found at the very end of this manual under "***Appendix***". Please continue to read this section and then jump to the *Appendix* section to actually install the applications software from the E-Plex Enterprise software CD on your laptop.
2. Ensure that you have the administrative rights to install the software on the PC. If you do not, you will require your IT personnel's help in installing the software. During installation, you will be required to register the E-Plex Enterprise software with Kaba so as to activate and use the software.
3. Connect your **Card ID Enroller** – Prox token based or Smart token based as appropriate, to the PC through a USB port. The enroller is plug-n-play and no driver installation is required.
4. **(Standalone) Express Installation:** For most situations, you will be installing the software (which consists of the Server, Client & M-Unit parts of the modules) on one standalone PC. Select the "Standalone / Express" install option which will automatically install all Enterprise software modules without any user/operator intervention, **or**

   (Custom) Network Installation: If on the other hand, you are going to be using a separate Server PC and one or more Client PCs in a networked environment, please check with your IT/Network Administrator for software installation rights, SQL password details etc. Typically, all Server related Prerequisites, followed by the Server part of the software module and the E-Plex SQL database module will need to be installed on the Server PC; you will be registering the software with Kaba during the Server part of the installation only, once. Then on each Client PC, you must install all Client related Prerequisites, the Client part and the M-Unit part of the software – as specified in the "(Software) Install Procedure" document on the CD. You must also connect a Card ID enroller to desired Client PC(s) to enroll your facility's user ID badges.

Software Installation & Registration

- Please refer to the ***Appendix*** at the end of this user guide on how to install the software. You will be also required to register the E-Plex Enterprise software with Kaba to receive the registration/activation key to be able to install and use the software.

Quick Start Tips

You can follow these useful tips to quickly set up and use the E-Plex Enterprise system and the associated E-Plex locks in your facility:

- Click the **E-Plex Enterprise Client** icon on your PC desktop to launch the software.

1. Set up the global Master User for the application and if it is you, remember your new Level 1 Operator Name and Password for future login sessions. Change the default "Your Private ID" number from 99999999 to a different 8-digit number. This Private ID combined with an internal unique number in your software is used as your unique *Customer Security key*. This unique key is encrypted and passed back and forth between the PC software, the M-Unit and the locks during their data communications. Refer to **Logging On for the First Time** in this chapter for more information.
2. Change the default 8-digit Master PIN 12345678 (to be used in the locks by the global Master) to a

different 8-digit Master PIN and remember this important PIN.

3. On the *System Setup* window, change any default parameters, such as all users' PIN length, date/time format etc, if desired.
4. Your unique 10-digit Software License number is displayed on the **Help | About** window. You will need to refer to this License number when contacting Kaba's technical support team to receive any technical support.
5. Ensure that the card enroller is connected to your PC.

> **Migration from Prox to Smartcard:** If your facility is migrating from an older Prox card technology to the newer, more secure Smart card technology, you will need to use both types of card enrollers to enroll these two different types of ID cards in the Enterprise system till the transition is complete.

6. Create your *Access Schedules* – assigning each schedule with period of time for each day when users should have entry access.
7. Optional: Create your *Holidays and Vacation blocks*.
8. Create your *Door Groups*.
9. Create your *Doors*, one door at a time – assigning each door with its various configuration parameters.
10. Optional: Create your *Access Groups* – assigning each access group with door or doors with schedules attached to each door.
11. Create your *Departments* (referred to as *User Groups* in Enterprise 1.x software)).
12. Create your *Users*, one user at a time – assigning each user with various user parameters such as a PIN, user type etc. You will also need to enroll the user's ID card, if this user will have access to any card based E-Plex locks in the facility).
13. For each user, you can also assign an Access Group, if you had already created a few access groups earlier, Or

    Access Assignment: If you did not create any Access Groups in the system, you can assign the user to a door for access under the Access Assignment menu. Select a previously created door and assign schedules and access credential required (PIN only, card only or PIN & card) during each schedule, holidays/vacations and assign users for this door who should have access. Additionally, assign schedules to each user in this door including any user Privileges, if desired.
14. Repeat Steps 12 through 13 above for other users created in the system for door(s) access.

> **Important: Ensure that the actual E-Plex lock on the door to be programmed is properly installed and initialized and its Lock Function is configured (for Privacy and/or Residence locks only), according to the Lock Function Setup Instructions that came with the lock in the box.**

15. *Transfer/download* your locks <-> users configuration data from the PC database to the *M-Unit* part of the database so as to be able to *program the locks* with the M-Unit.
16. Take the M-Unit (the same laptop or a separate Netbook PC) which contains the M-Unit program to each of the desired doors/locks and program them, one at a time. Repeat this step to program all locks in your facility.
17. Similarly, you can go to the desired locations and *audit the required locks* in your facility for later uploading back to the PC for viewing/printing the lock audit Reports.

Starting E-Plex Enterprise Software on a Standalone PC (or, on a Client PC in Networked Configuration)

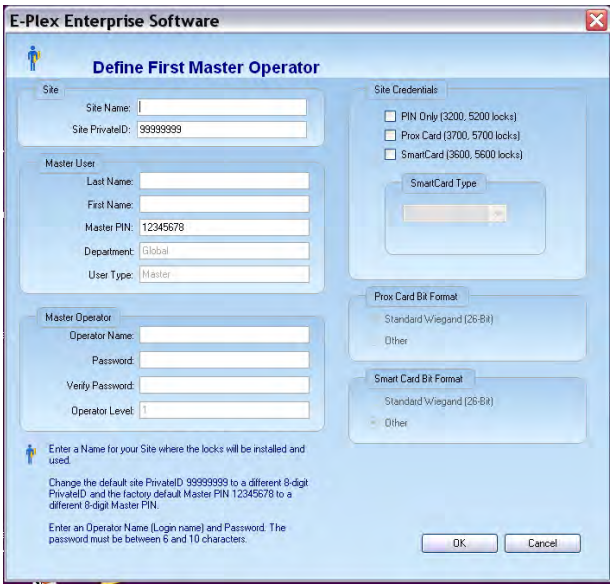
Note: *Ensure that your applicable card ID enroller (Prox or/and Smartcard) is connected to your (Client) PC through the USB port and is recognized by the PC, if you will be using card based E-Plex locks on your site.*

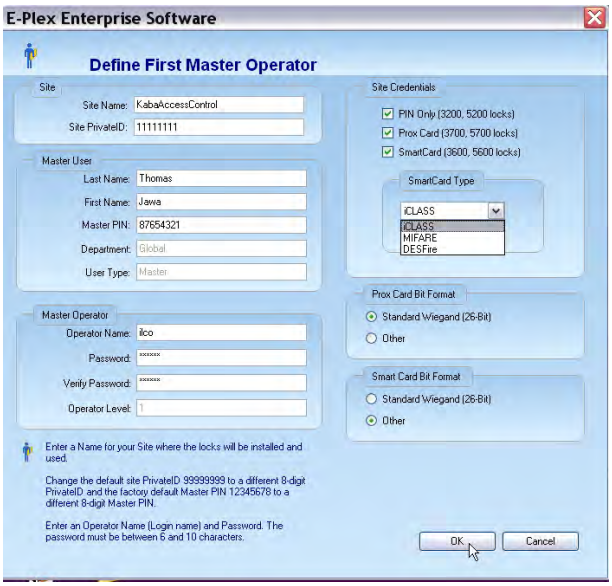
You can start the E-Plex Enterprise on the PC by clicking the **E-Plex Enterprise** icon on the desktop.

Note: *Do not delete the default desktop icon or modify it in any way.*

Logging On for the First Time

When you have clicked the **E-Plex Enterprise (Client)** icon on the desktop for the very first time, the software displays the **Define First Master Operator** window as shown on the left hand side, below.


E-Plex Enterprise Software
Define First Master Operator
Site
Site Name:
Site PrivateID: 99999999
Site Credentials
PIN Only (3200, 5200 locks)
Prox Card (3700, 5700 locks)
SmartCard (3600, 5600 locks)
SmartCard Type
Master User
Last Name:
First Name:
Master PIN: 12345678
Department: Global
User Type: Master
Prox Card Bit Format
Standard Wiegand (26-Bit)
Other
Master Operator
Operator Name:
Password:
Verify Password:
Operator Level: 1
Smart Card Bit Format
Standard Wiegand (26-Bit)
Other
Enter a Name for your Site where the locks will be installed and used.
Change the default site PrivateID 99999999 to a different 8-digit PrivateID and the factory default Master PIN 12345678 to a different 8-digit Master PIN.
Enter an Operator Name (Login name) and Password. The password must be between 6 and 10 characters.
OK
Cancel



- As shown in the picture on the right hand side, enter your **Site Name** (your company or facility name) which will be displayed on your system reports.
- Change the default "*Site Private ID*" value from 99999999 (ie., 8 nines) to any other number. The system will use this number in conjunction with a unique internal factory number to generate an encryption/decryption key in the database. This combined (but hidden) value will be your unique Customer Security Key which will be used in (i) protecting your Enterprise database, and (ii) in communicating lock/user configuration data between the PC, M-Unit and the E-Plex locks.

- Enter the following information in the **Master User** fields for the global Master user of all the locks in your facility:

  Last Name

  First Name

  New Master PIN number – must be 8 digits long.

Note: *The default factory Master PIN number is 12345678. You must change to a different 8-digit PIN number which you must enter and remember it (or write it down and store it in a safe place) for future routine use.*

- Enter the following information in the **Master Operator** fields who will be the first Level-1 (highest) system administrator/operator to manage the Enterprise software system on the PC:

  (Master) *Operator Name:* this is the Enterprise system's Login name – typically the Master (PC Login) operator in the system and the global Master user in the lock is one and the same person.

  Important: The operator login name "kaba", or "Kaba", or "KABA" etc cannot be used; if you try to create this login name, you will get an error message.

  Password: this must be minimum 6 alphanumeric characters

  Verify Password by re-entering

  Click **OK**. The software displays the Main Menu for the E-Plex Enterprise.

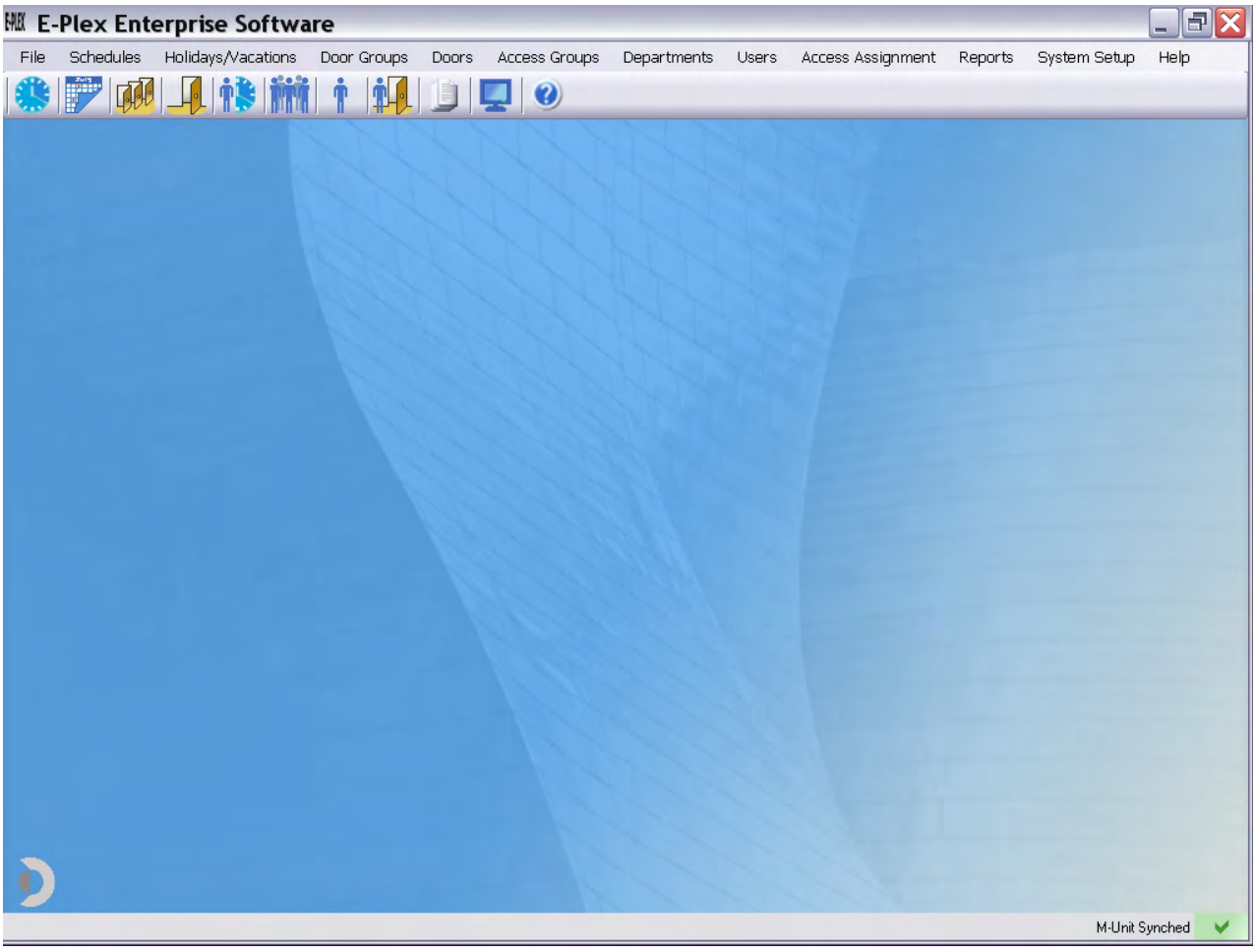
Note: *From now on, must use this newly created logon credentials (operator name and password) to logon to the Enterprise software.*

- Check the relevant box(es) for the **Site Credentials**; ie., what kind of E-Plex locks are being used in your facility. If you are going to be using PIN only lock series (E32xx and E52xx), you need to check that box only; no card credentials and relevant ID card enroller(s) are required.
- If you selected smartcard locks, you must also specify what type of smart card/credential you will be using in your facility (one type only) -> iClass, Mifare or DESFire. The smartcard lock series are E36xx and/or E56xx.
- Prox Card Bit Format: If you selected earlier Prox card based locks, you must also specify the Prox card bit format -> either as 26 bit Standard Wiegand or "Other" (27 through 84 bits). The Prox card lock series are E37xx and/or E57xx.
- Smart Card Bit Format: The same applies if you had selected a Smartcard based lock but using the iClass credential (not Mifare or DESFire). Click **OK** when done.

Recovering Forgotten Password

- Click *'Forgot Password"* and follow the screen instructions to recover your login password.

Main Menu and Toolbar



This section describes the Main Menu and Toolbar, which are the primary points to access the functions of the E-Plex Enterprise.

Main Menu

The Main Menu provides access to all functions and displays the available menu options.

The following 12 drop-down menus are available from the Main Menu:

File

Schedules

Holidays/Vacations

Door Groups

Doors

Access Groups

Departments (Note: In previous Enterprise 1.x software version, this field was called *User Groups,* it means one and the same !)

Users

Access Assignment

Reports

System Setup

Help

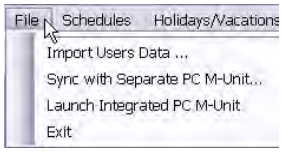
Please refer to the appropriate sections in the manual in **Chapter 3** for more detail on each of the options that are available from the drop-down menus. These menu options are also available from the Toolbar as shown below.

Toolbar

The Toolbar is located directly below the Main Menu and displays the icons for the Main Menu options.

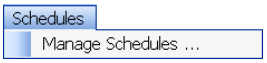
You can select an icon on the toolbar by positioning the mouse pointer on the icon and clicking the left mouse button one time. The menus available from the Enterprise Main Menu and the corresponding Toolbar icon (if applicable) are described in the following sections.

File Menu



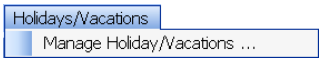
From the **File** menu, you can either (i) Import users (basic info such as names, PINs and Prox or iClass card ID numbers in 26-bit Standard format, if available), (ii) Manually sync locks/users configuration data and locks' audited data between the (Client) PC and a separate PC M-Unit (Netbook) device, (iii) automatically sync the above configuration data between the PC and the M-Unit, if the Enterprise and M-Unit software modules are "integrated" and reside within the same PC, and (iv) Exit from the software.

Schedules



From the **Schedules** menu, you can add, edit, or delete unlimited number of access schedules in the system database. Note: You can assign a maximum of 16 schedules in each lock out of the total number of schedules in the system database. An access schedule is a defined time period during the span of a week in which users can be granted access to the door. One of the 16 schedules will have an "Always" (24/7) access schedule that is built into the system software; this schedule cannot be changed or deleted.

Holidays/Vacations



From the **Holidays/Vacations** menu, you can create unlimited number of holidays/vacations in the system database but can set up a maximum of 32 holiday and vacation schedules per lock. When a holiday or a vacation period (ie., one day or a consecutive block of days) is

assigned to a door, the door will NOT grant access to any Users during that period. Holidays/vacations can be overridden by any users – Manager, Access, Guest and/or Service, if they are given this holiday override "Privilege" in the software.

Door Groups

From the **Door Groups** menu, you can add, edit, or delete any number of door groups. Each Door Group must contain one (and only one) Door Group Manager.

Doors

From the **Doors** menu, you can add, edit, or delete any number of physical doors with associated E-Plex lock configuration parameters. You must select and assign to each door one or more (up to 16) Access Schedules from previously created Access Schedules in the system including the Credential Type to be used (PIN only, Card only or PIN & Card) during each schedule period. You must ensure that these access schedules do not overlap, but if you do, the system will prompt you to correct this scenario. Optionally, you can also select and assign from previously created Holidays/Vacations in the system, from one to 32 holiday/vacation periods to each door. Free passage is disabled in the lock by default but you can enable one of three Passage mode options for each schedule period – (i) Manual passage (at lock keypad), (ii) Automatic Schedule based Passage, or (iii) First authorized user access Passage.

Access Groups

From the **Access Groups** menu, you can add, edit, or delete any number of access groups which contain the doors with their schedules and associated users. An access group can consist of one or more doors, each with a schedule and the credential type to use during that schedule for each door. You can also assign one or many users in each access group you created. Additionally, each access group can be "cloned" as a new access group; this cloned access group can be edited to add or remove door(s) and/or user(s) from it very quickly instead of trying to create a new one from scratch, thus saving enormous operator data key entry time. Optionally, you do not need to create any access groups in the system if you have only a handful of locks/doors and only limited users who will need access in your facility. If this is the case, you can configure your facility's door/user access assignment setup under the **Access Assignment menu** instead of doing it here.

Departments

From the **Departments** menu, you can add, edit, or delete any number of Departments (user groups). The use of Department in the software is for your convenience only to define and organize each department containing your users belonging to that department or user group. However, the Department field data is not recognized by the E-Plex locks.

Users

From the **Users** menu, you can add, edit, or delete any number of users in the database but up to 3,000 users and their associated PINs in a lock. You can also enroll (add), if required and available, each user's ID card, or remove it, if previously assigned from the database. If you have a deck of the Standard 26-bit format HID Prox or iClass cards, you can "batch enroll" all these hundreds of cards/users in the system in one operation. This assumes that each card contains the same 3-digit Facility code on each card and the card numbering on each card is sequential. Additionally in this menu, you can assign to each newly created user an existing Access Group (of doors), thus assigning all these doors with their access schedules to the user in one quick operation.

- There are five (5) types of users that an E-Plex lock can recognize:

(1) Manager: Lock programming/auditing rights; schedule based access with optional privileges; no expiry

Door Group Manager: <u>One</u> (and only one) DG Manager in all locks belonging to her/his Door Group; 24/7 lock programming/auditing rights and 24/7 access with all privileges; ie., same functionality as the Global Master, except applies to her/his Door Group locks only

(2) Access: Schedule based access with optional privileges; no expiry

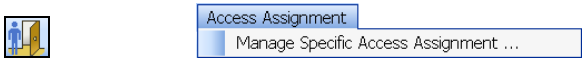
(3) Guest: Schedule based access with optional privileges; 1 year max expiry

(4) Service: 24/7 access from first access with various expiry options: either one time entry only, or 1 – 96 hours expiry, or no expiry

(5) M-Unit: 24/7 lock programming/auditing rights only but <u>no</u> access; no expiry

Refer to the **Summary of Pushbutton Programming Commands** table in **Chapter 4**, **Operating the E-Plex Lock at its Keypad**, for detailed lock programming & auditing rights of the global Master, Manager(s) and the M-Unit(s) users.

Access Assignment (includes assigning user Privileges)



Note: *Everything related to door <-> users access control info is tied together in this menu, just like in the Access Groups menu.*

From the **Access Assignment** menu, you must select a door that you want to populate with valid users for access. For each user, select and assign required access schedules from the available door schedules that were previously assigned to this door from the Manage Doors configuration menu.

- Also, for each user type, you can optionally assign any one or more of the following three (3) Privileges:

(1) Override holidays/vacations: By default, assigned to a Manger user but can be changed

(2) Override deadbolt privacy: Applies to Privacy locks only

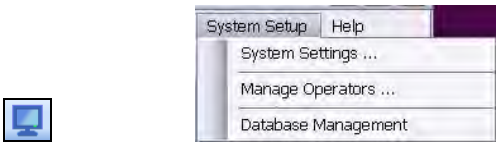
(3) First user passage entry: By default, assigned to a Manger user but can be changed

After this access assignment process, the lock configuration data is set up and prepared to be synchronized with the M-Unit for uploading to lock(s).

Reports

From the **Reports** menu, you can generate many useful reports from the E-Plex Enterprise system database for viewing and/or printing. The reports can also be exported in PDF, Word, Excel etc file formats, if desired.

System Setup



From the **System Setup** menu, you can (i) set up and maintain all important Enterprise system configurations, (ii) manage system Operators and their passwords, and (iii) perform routine system database maintenance like backup and restore operations.

Help

From the **Help** menu, you can (i) access the *Software User Guide* to view/print, and (ii) by clicking on *About*, you can display all product specific info such as: The Software Version number, Your (End user's) unique Site License number, Kaba's Technical and Customer Support Phone numbers etc as shown below:

3 Using the E-Plex Enterprise Software

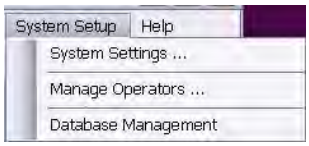
This chapter explains how to use the E-Plex Enterprise system software on a regular basis to suit your physical access control security needs. It typically involves the following items:

- System Setup Menu
- Managing Access Schedules
- Managing Holidays/Vacations
- Managing Door Groups
- Managing Doors
- Managing Access Groups
- Managing Department
- Managing Users
- Managing Access Assignment
- Importing Users
- Viewing/Printing/Exporting Reports

System Setup Menu

The **System Setup** menu allows you to define and maintain global system settings that, in most cases, you need to do this only during the initial system setup.

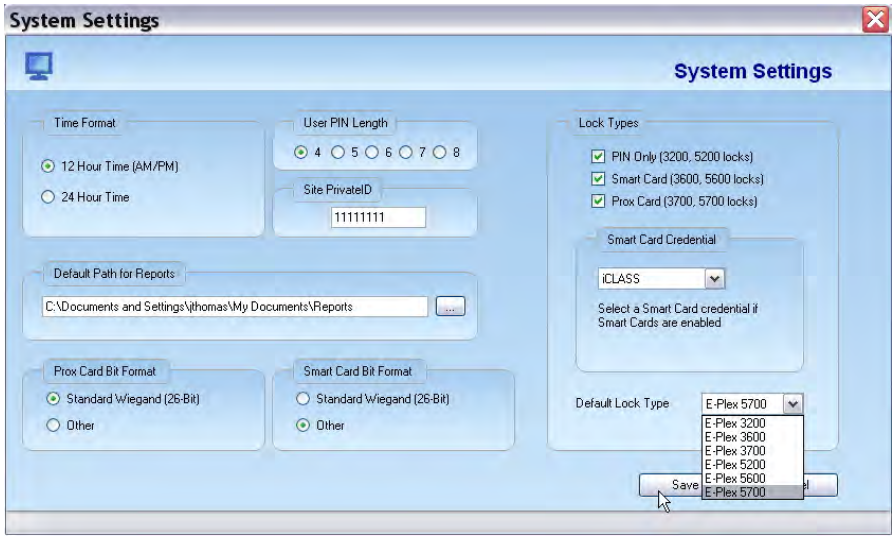
To access system settings, select an option from the **System Setup** menu or click the **System Setup** menu icon.



Changing System Settings

You should establish the system settings before you begin using the E-Plex Enterprise on a daily basis – typically you need to do this at initial install only. However, you can use this feature at any time if you need to update or add to the existing information.

From the System Setup menu, select **System Settings**. The system displays the **System Setup** window.



- Edit the following data areas as desired:
  - **Time Format**

    Select the display of **Time Format** for your system. The default is **12-Hour Time** (a.m. and p.m. display), and the other option is **24-Hour Time** display.

    Note: *The Enterprise software uses the start and end dates/times of the DST setup directly from your PC's Operating System. You must also ensure that the DST setup and the current date & time are setup correctly on your portable M-Unit device.The M-Unit automatically sends this information to the locks every time the lock is programmed so that the DST switching in the lock will occur automatically in Autumn and Spring.*

  - **User PIN Length**

Select the appropriate global **User PIN Length**—between four and eight digits—that you will be using in your system. The default user PIN length is four digits.

Important: The first 4 digits must be always unique when assigning PIN numbers for each user later in the software; this is for security reasons.

- **Site PrivateID**

  The 8-digit Site PrivateID is combined with an internal unique factory to generate a unique hidden customer (your) encryption/decryption key. The customer key is used throughout the Enterprise system – database, M-Unit and locks in protecting data communications and the database.

  Important: If in the future after deploying your system and locks, for some reason you need to change the value of the Site PrivateID, you must re-initialize and re-program all the E-Plex locks in your facility. This is because the original encryption/decryption communications key inside the locks will have to be changed again since it has been modified now in the software.

- **Default Path for Reports and PC Activity Log**

  This field defines the default directory path to be used when generating and saving reports and archived data files. You can browse and select/change the path for reports to a CD-RW drive, network drive, jump drive or another similar type of drive.

- **Prox Card Bit Format & Smart Card) Bit Format (For E3700/5700 Prox locks & E3600/5600 iClass locks only)**

  Select the appropriate Wiegand bit format for yourProx and/or iClass ID Cards that you will be using in your facility. The default value is **Standard Wiegand (26-Bit)**. If you select the non-standard **Other (= 27 to 84-Bits)**, you must use the applicable Prox card and/or the Smart card Reader/Enroller to assign the tokens/cards for the users. If you checked the “Other” option, the display of the card ID format in the Users dialog menu will not be in standard xxx-yyyyy (3 digit facilty code – 5 digit card number) format, but will display as one long hexadecimal number only.

- **Lock Types**

  Select one or all three types of locks that you will be installing on your site -> PIN only (E3200, E5200), and/or PIN & Smartcard (E3600, E5600), and/or PIN & Prox (E3700, E5700).

- **Smart Card Credential**

  If you had selected PIN & Smartcard under “Lock Types” above, this sub-option will be enabled for you to futher narrow it down to which of the following three Smartcard credentials you will be using -> DESFire, or iClass or Mifare.

  Important: You can select only one of these three types of Smartcard credentials.

- **Default Lock Type**

  Finally, you can select a (default) lock type that will be most used in your facility. Whenever to create a new door/lock in the database, this lock model will be automatically selected to speed up data entry, which if required can be changed to another lock type.

Once you have updated the desired fields, click **Save**. The software confirms that the changes saved successfully in the status bar of the window.

Or,

- Click **Cancel** to close the **System Setup** window without saving changes.
- Click the red X in the upper right corner of the window to close the **System Setup** window.

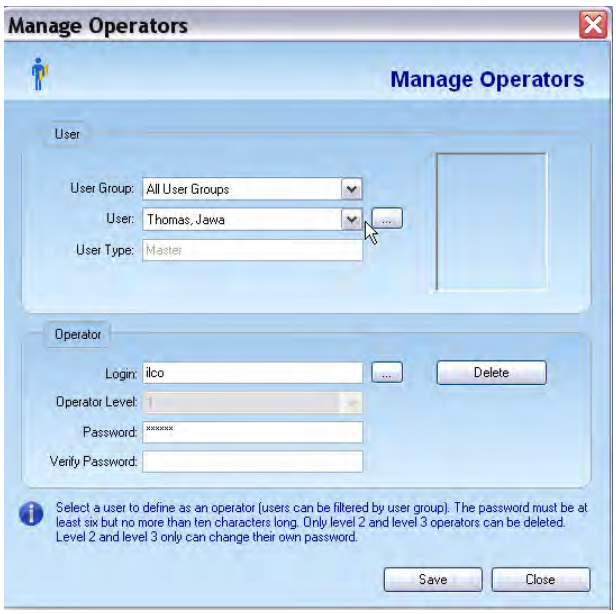
Managing Operators

The **Manage Operators** option allows you to create a new Operator and manage existing Operators in the system.

Important: *The first Operator that you create in the software upon installation automatically becomes a Level 1 (highest authority) Operator. Only Level 1 Operators can add or delete other Level 2 or Level 3 (lowest authority) Operators. See* ***Chapter 1*** *for a detailed description of the E-Plex Enterprise* ***System Operator Classifications****.*

Complete the following steps to manage Operators:

- From the **System Setup** menu, select **Manage Operators**. The software displays the **Manage Operators** window. Note: You must first create a few users in the system before hand under the “Managing Users” menu so as to assign one or more of them here as Operators of the Enterprise software system.

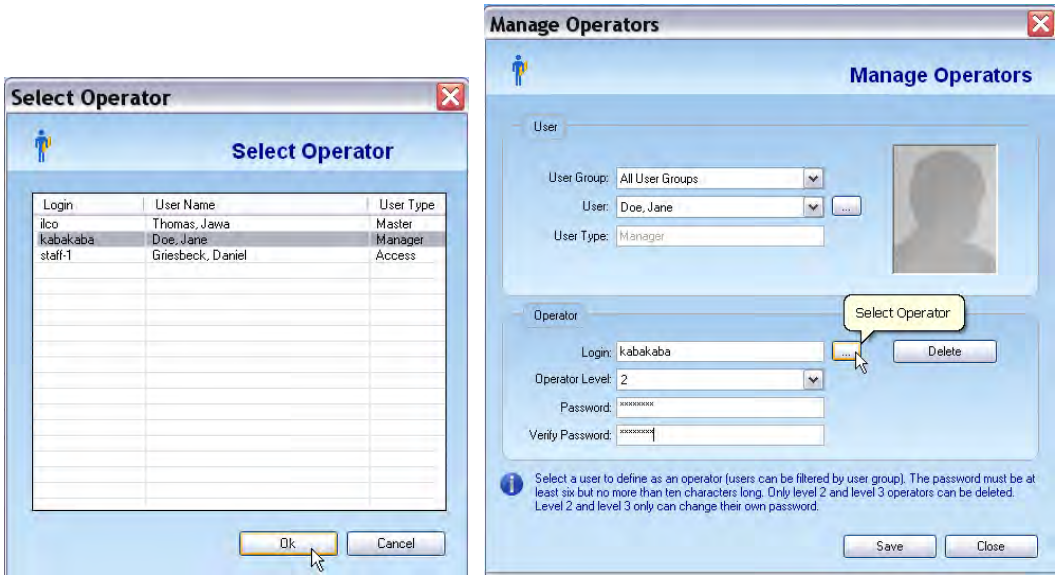

Manage Operators
Manage Operators
User
User Group: All User Groups
User: Thomas, Jawa
User Type: Master
Operator
Login: ilco
Delete
Operator Level: 1
Password: ******
Verify Password:
Select a user to define as an operator (users can be filtered by user group). The password must be at least six but no more than ten characters long. Only level 2 and level 3 operators can be deleted. Level 2 and level 3 only can change their own password.
Save
Close

User Area:

- From the **Department** (**User Group)** drop-down list, select the **Global** user group (by default, already exists in the system) or **All Departments**. To add, edit, or delete a user group, refer to **Managing Departments** in this chapter.
- From the existing **User** drop-down list, select the appropriate user whom you want to be an Operator of the software also. To add a user from this menu, click the ellipsis button and add a new user so as to assign her/him as an operator.

Operator Area:

- In the **Login** field, enter/edit the login name/ID for the selected operator. To select a different Operator, click the ellipsis button -> [...]
- Select the Operator from the **Select Operator** window and click **OK**.



- In the **Operator Level** field, select 1 (highest authority), 2 or 3 (lowest) as the System Operator authority/privileges level. For details, please refer to *"PC System Operator Classifications"* described in *Chapter 1*.
- In the **Password** field, enter a Password for the selected Operator.

> ***Note:*** *The Password must be at least six but no more than ten (alphanumeric) characters long. Level 2 and Level 3 Operators can change their own password but cannot add or delete themselves.*

- In the **Verify Password** field, re-enter the password.
- Click **Save**. The software displays confirmation that the changes were saved successfully.
- Click **Close** to exit the **Manage Operators** window.

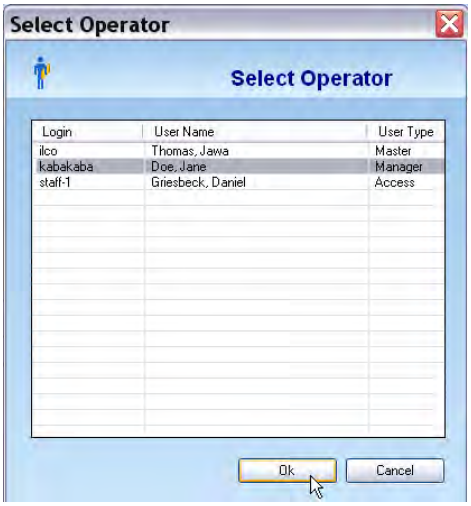
Changing an Operator Password

The **Change Password** option allows you to change an Operator's password. Complete the following steps to change an Operator's password:

- From the **System Setup** menu, select **Manage Operators**. The software displays the **Manage Operators** window.
- Select an Operator by clicking the ellipsis button in the Operator area of the window ->

[...]

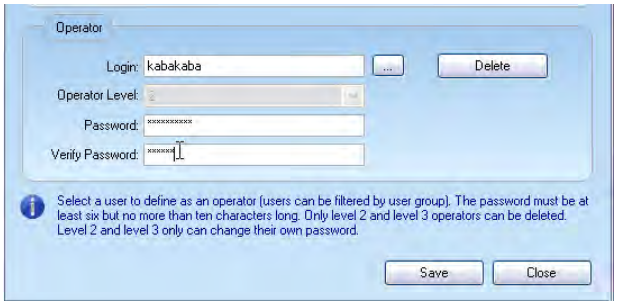
Select the Operator from the **Select Operator** window and click **OK**.



- In the **Password** field, enter a new password for the selected Operator.

Note: *The Password must be at least six but no more than ten (alphanumeric) characters long. Level 2 and Level 3 Operators can change their own password but cannot add or delete themselves.*

- In the **Verify Password** field, re-enter the password.


Operator
Login:
kabakaba
Delete
Operator Level:
Password:
Verify Password:
Select a user to define as an operator (users can be filtered by user group). The password must be at least six but no more than ten characters long. Only level 2 and level 3 operators can be deleted. Level 2 and level 3 only can change their own password.
Save
Close

- Click **Save**. The software displays confirmation that the changes were saved successfully.
- Click **Close** to exit the **Manage Operators** window.

Deleting an Operator

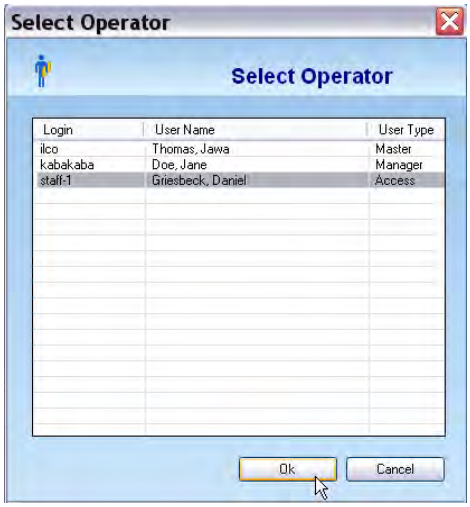
The **Delete Operator** option allows you to delete an Operator from the system.

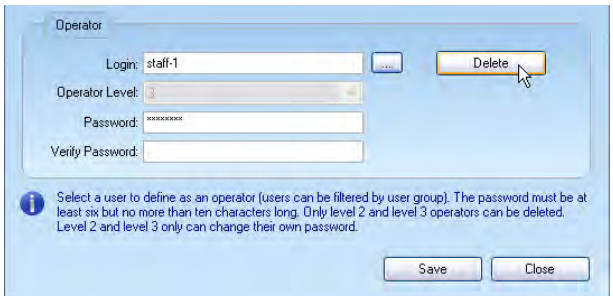
Note: *Any Level 1 Operator can delete Level 2 and Level 3 Operators; Levels 2 & 3 Operators cannot delete any operators. A Level 1 Operator can be deleted only by another Level 1 Operator.*

Complete the following steps to delete an Operator:

- From the **System Setup** menu, select **Manage Operators**. The software displays the **Manage Operators** window.
- Select an Operator by clicking the ellipsis button in the Operator area of the window ->

Select the Operator from the **Select Operator** window and click **OK**.




Operator
Login:
staff-1
Delete
Operator Level:
Password:
Verify Password:
Select a user to define as an operator (users can be filtered by user group). The password must be at least six but no more than ten characters long. Only level 2 and level 3 operators can be deleted. Level 2 and level 3 only can change their own password.
Save
Close

- Click **Delete.** The software prompts you for confirmation.

- Click **Yes.** The system deletes the operator.
- From the **Manage Operators** window, click **Save** and then **Close** to exit the window.

Database Management

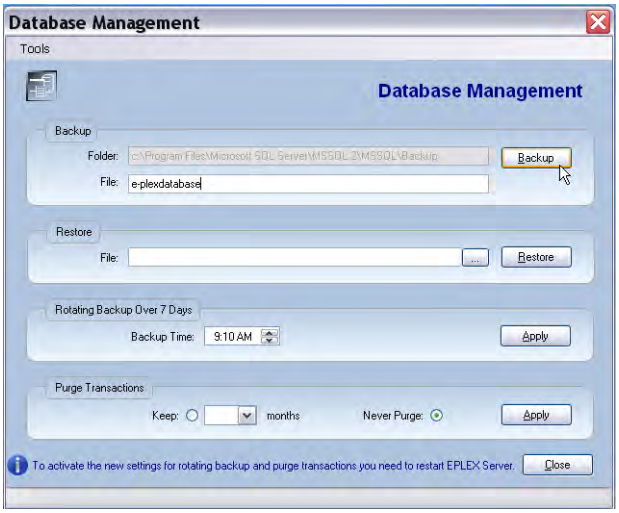
The **Database Management** feature enables you to periodically back up the Enterprise system database. You can also restore the last backed up database in case of corruption in the current database.

Important: It is highly recommended that you perform a periodic back up of your database.

Backing up the Database

Complete the following steps to back up the database:

- From the **System Setup** menu, select **Database Management**. The software displays the **Database Management** window.



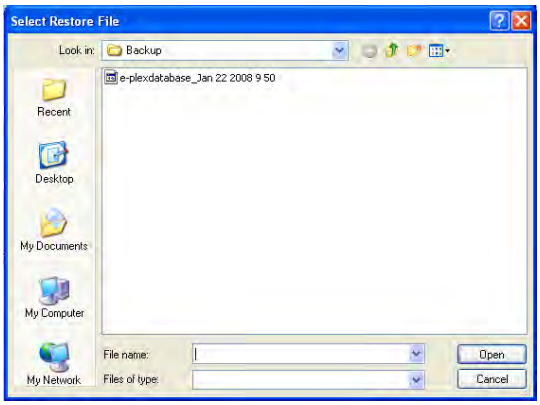
- Enter a file name in the **File** field of the **Backup** area.
- Click the **Backup** button to back up the database. The database will be backed up automatically in the secure Micro-Soft SQL system directory (by default) with date/time stamp for later retrieval, if need be. When the backup is complete, the system displays a message in the status bar of the **Database Management** window.

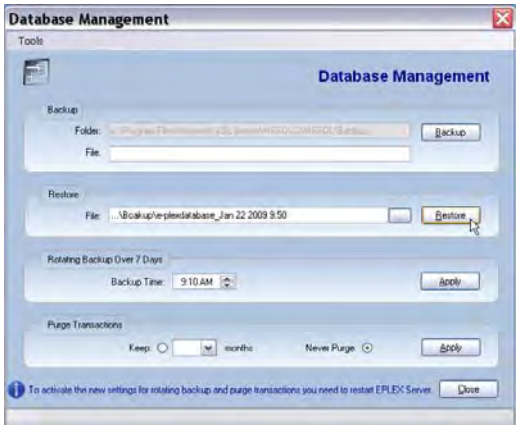
Backup Done: c:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Backup\e-plexdatabase_Jan 22 2008 9 50

Restoring the Database

Complete the following steps to restore the database:

- Click the ellipsis button in the **Restore** area.
- The system displays the **Select Restore File** window. Choose the database that you want to restore and click **Open**. The system displays the file location in the **File** field of the **Restore** area.





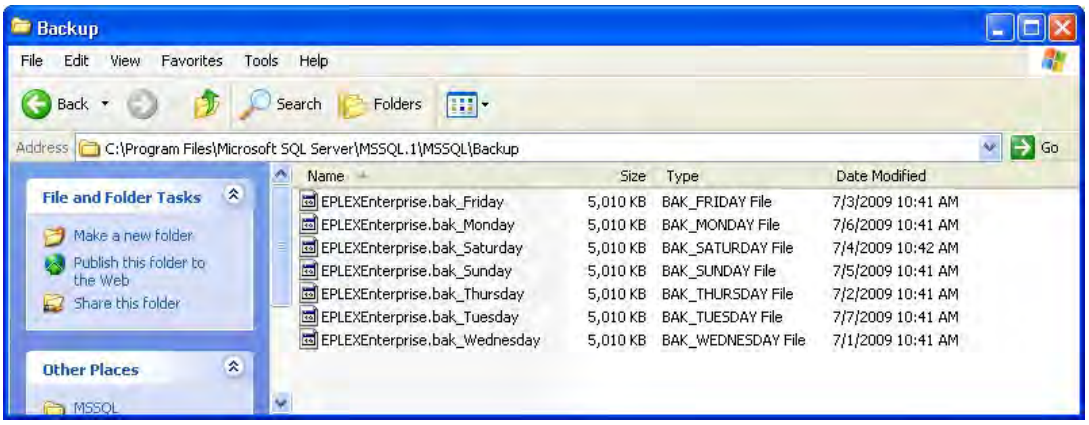
- Click **Restore**. The system prompts you for confirmation with a warning to say that this restore operation will overwrite your current database which will then be lost etc.
- Click **Yes** to continue or **No** to cancel.
- If you click **Yes**, the system restores the selected database and displays a message in the status bar of the **Database Management** window.

Restore Database Done

- Click **Close** to close the **Database Management** window.

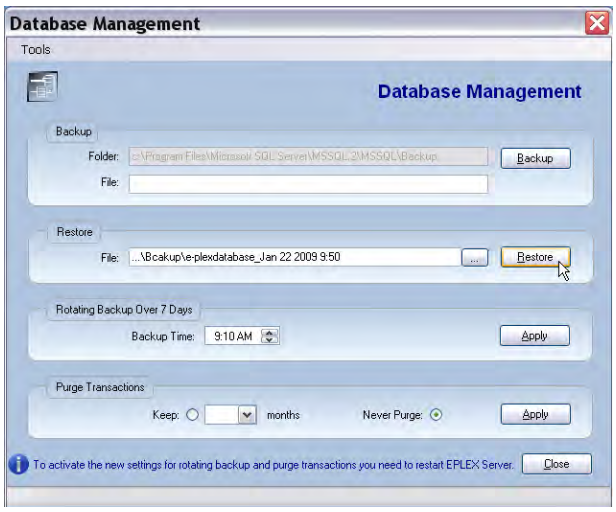
Rotating Backups Over 7 Days

- In this section, you can specify at which time a daily automated back-up will take place.
- Select the time you want the back-up to be taken and click **Apply**.
- A back-up will be performed daily at the specified time. The format of the saved files are as follows:


Backup
File Edit View Favorites Tools Help
Back Search Folders
Address C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Backup
Go
File and Folder Tasks
Make a new folder
Publish this folder to the Web
Share this folder
Other Places
MSSQL
Name Size Type Date Modified
EPLEXEnterprise.bak_Friday 5,010 KB BAK_FRIDAY File 7/3/2009 10:41 AM
EPLEXEnterprise.bak_Monday 5,010 KB BAK_MONDAY File 7/6/2009 10:41 AM
EPLEXEnterprise.bak_Saturday 5,010 KB BAK_SATURDAY File 7/4/2009 10:42 AM
EPLEXEnterprise.bak_Sunday 5,010 KB BAK_SUNDAY File 7/5/2009 10:41 AM
EPLEXEnterprise.bak_Thursday 5,010 KB BAK_THURSDAY File 7/2/2009 10:41 AM
EPLEXEnterprise.bak_Tuesday 5,010 KB BAK_TUESDAY File 7/7/2009 10:41 AM
EPLEXEnterprise.bak_Wednesday 5,010 KB BAK_WEDNESDAY File 7/1/2009 10:41 AM

Purge Transactions

- In this section, you can specify how long to keep the record of operator activity that is logged in the Enterprise Database. This information is viewable via the “System Activity Log”, as described in the section called **Viewing / Printing / Exporting Reports**.
- You can choose either to **Keep** the logged transactions for the number of months you specify, or to **Never Purge** them.
- Make your selection and click **Apply**.

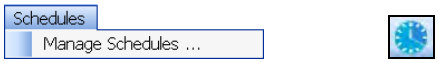


Managing Schedules

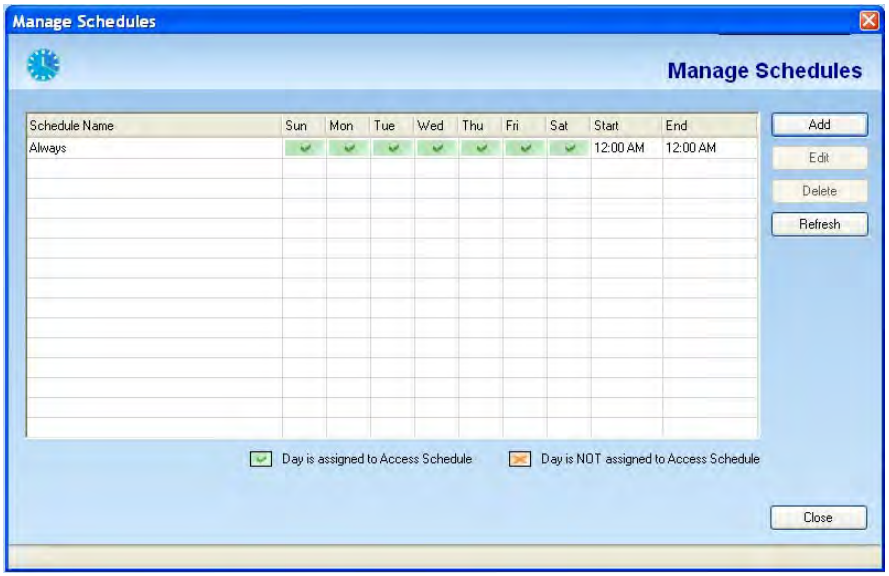
A schedule is a defined time period during the span of a week during which users are granted access to the door. The Enterprise software allows you to globally define schedules. Once you have defined schedules, you will assign them to doors and to the users who will access those doors. The software allows you to manage schedules through the **Schedules** menu.

Note: *You can define up to 16 schedules in the lock but any number of them in the system software. However, the "Always" schedule is standard and is pre-defined in the system. It cannot be changed or deleted. The "Always" schedule allows 24/7 access to its associated doors and users.*

- To manage access schedules, select **Manage Schedules** from the **Schedules** menu or click the **Manage** button.



- The software displays the **Manage Schedules** window.



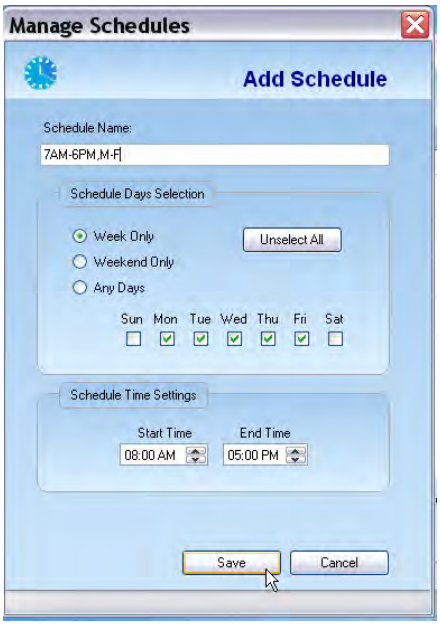
- From this window, you can add, edit, or delete access schedules.

Adding a Schedule

Complete the following steps to manage schedules:

Note: *You may add additional schedules at any time.*

- From the **Manage Schedules** window, click **Add**. The software displays the **Add Schedule** window.

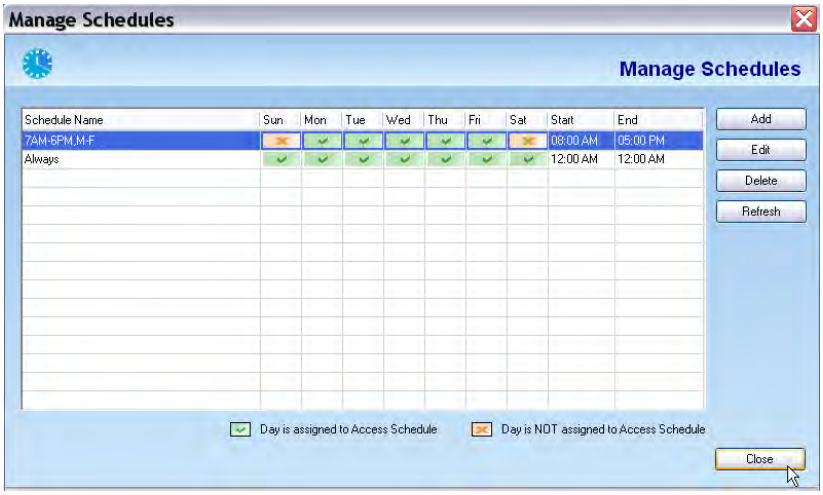


- In the **Schedule Name** field, type the name of the schedule you are adding – Egs. “Day-Shift” or “7AM-6PM, M-F” etc.

Note: *The schedule name can be a maximum of 20 alphanumeric characters but no spaces and special characters are allowed, except the “-“ character.*

- Select the appropriate time range: **Week Only**, **Weekend Only**, or **Any Days**.
- Select the appropriate check box for the day(s) you want to add to the access schedule. These are the days that users will have access to a door.
- In the **Start Time** field, select a start time. This is the time that access begins each day.
- In the **End Time** field, select an end time. This is the time that access ends each day.
- Click **Save**. The software displays a **Changes Successfully Saved** message.

- Click **OK**. The system displays the new access schedule in the **Manage Schedules** window.



- Click **Close** to exit the **Manage Schedules** window.

Note: *Once added, the access schedule becomes available in the* ***Schedule*** *drop-down list throughout the Enterprise software.*

Editing a Schedule

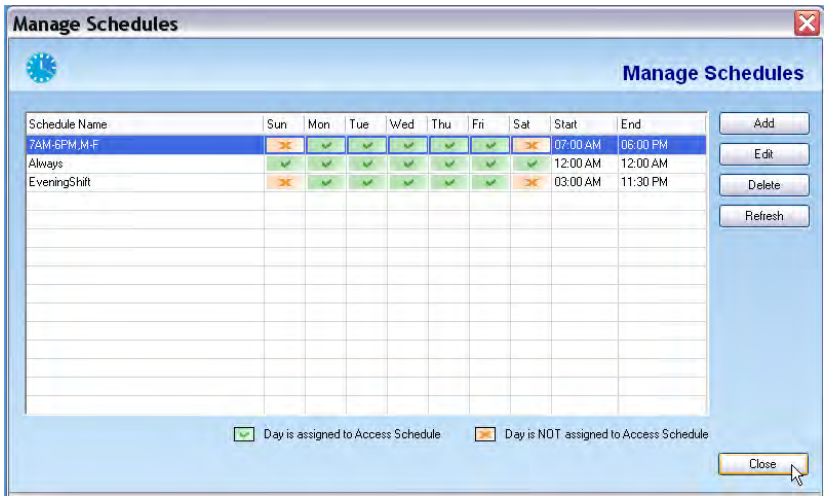
Complete the following steps to edit access schedules:

- From the **Manage Schedules** window, highlight and click an access schedule you want to edit.
- Click **Edit button**. The software displays the **Edit Schedule** window.

- In the **Schedule Name** field, change the name of the schedule, if necessary.
- Select the appropriate check box for the day(s) you want to change in the schedule. These are the days that users will have access to a door.
- In the **Start Time** field, change the start time, if necessary. This is the time that access begins each day.

- In the **End Time** field, change the end time, if necessary. This is the time that access ends each day.
- Click **Save**. The software displays a **Changes Successfully Saved** message.

- The system displays the updated schedule in the **Manage Schedules** window.



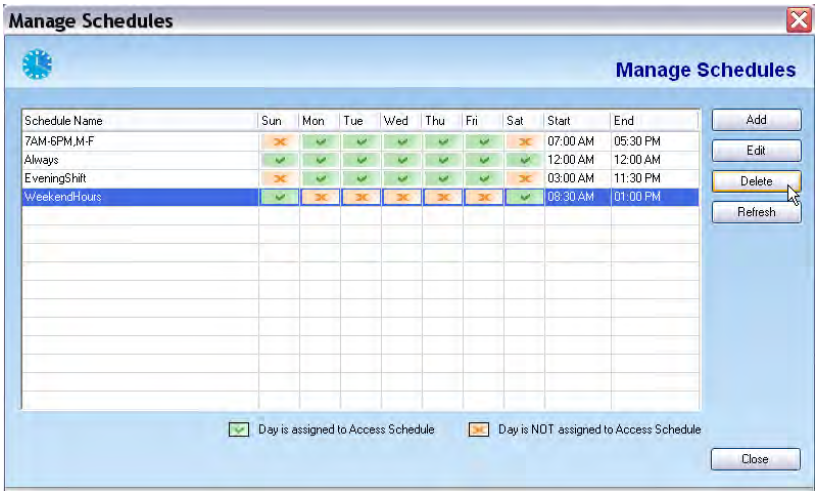
Note: *You should update your locks if you modified any existing Access Schedules in those locks by transferring the changes to the M-Unit and programming/uploading the changed information to the locks. For more information, refer to* ***M-Unit Handheld*** *in* **Chapter 5,** ***Programming and Auditing Locks***.

Deleting a Schedule

Complete the following steps to delete access schedules.

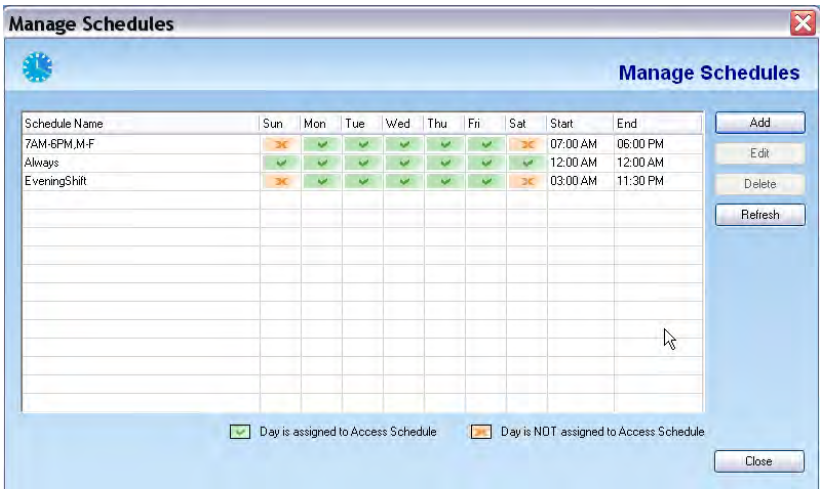
Note: *You cannot delete an access schedule if it is already assigned to a door or doors.*

- From the **Manage Schedules** window, highlight and click the access schedule you want to delete.



- Click **Delete**. The software prompts you for confirmation.

- Click **Yes** to confirm the deletion. The system deletes the schedule from the database and returns to the **Manage Schedules** window.

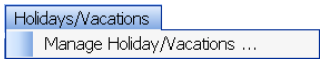


Managing Holidays/Vacations

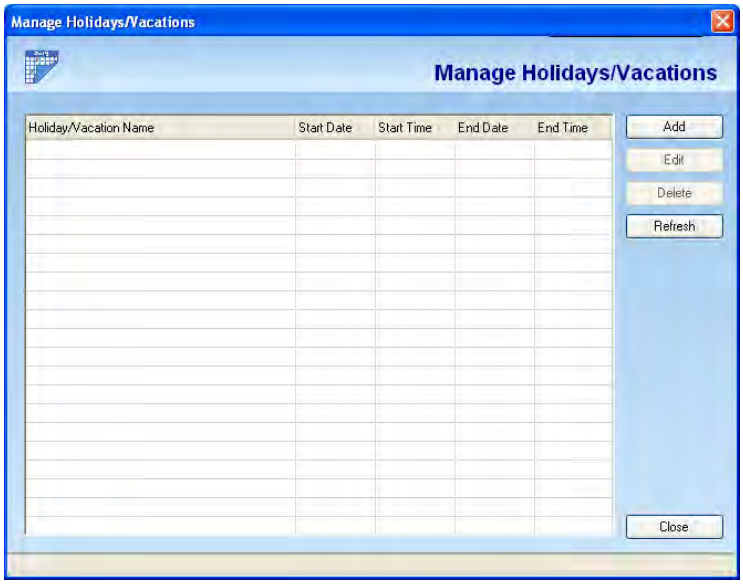
A holiday/vacation is a defined time period during which users will NOT be granted access to a door. By default, there will be no access allowed to a door/lock during a defined Holiday/Vacation period, except for any assigned “privileged” users in the system. By default, all Manager users have the privilege to override Holidays/Vacations.

Note: *You can define a maximum of 32 holiday/vacation periods in the lock but any number of them in the system.*

- To manage holidays/vacations, select **Manage Holidays/Vacations** from the **Holidays/Vacations** menu or click the **Manage Holidays/Vacations** button.



- The software displays the **Manage Holidays/Vacations** window.

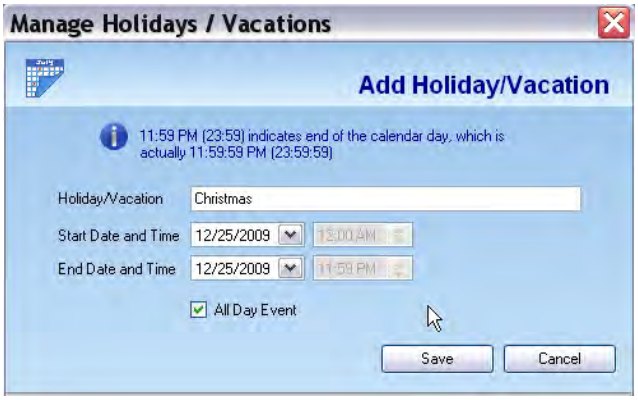


- From this window, you can add, edit, or delete holidays or vacations.

Adding a Holiday/Vacation

Complete the following steps to add a holiday/vacation.

- From the **Manage Holidays/Vacations** window, click **Add**. The software displays the **Add Holiday/Vacation** window.



- In the **Holiday/Vacation** name field, type the name of the holiday (one day) or vacation block (a block of consecutive days within that year) you are adding.

Note: *A holiday or vacation name can be a maximum of 16 alphanumeric characters and no spaces and special characters are allowed, except for the "-" character.*

- Leave the **All Day Event** check box selected if you want a 24-hour period holiday, like New Year's Day. Uncheck the box if the holiday or vacation you are entering is a block of consecutive vacation days with specific start/end dates and times within that year.

Note: *The **All Day Event** check box is selected by default.*

- In the **Start Date** field, select the start date by using the drop-down arrow.

Note: *12:00 AM indicates midnight or the start of the calendar day.*

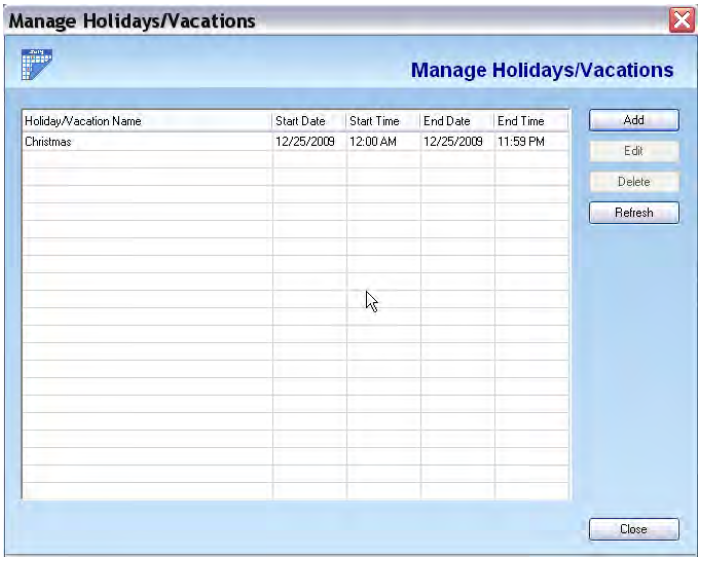
- In the **Start Time** field, select a start time by using the up and down arrows.

Note: *The **Start Time** field will be grayed out if the **All Day Event** check box is selected.*

- In the **End Date** field, select the end date by using the drop-down arrow.
- In the **End Time** field, select an end time by using the up and down arrows.

Note: *The **End Time** field will be grayed out if the **All Day Event** check box is selected.*

- Click **Save**. The system saves the changes and displays a confirmation message.
- The system displays the new holiday or vacation name in the **Manage Holidays/Vacations** window.

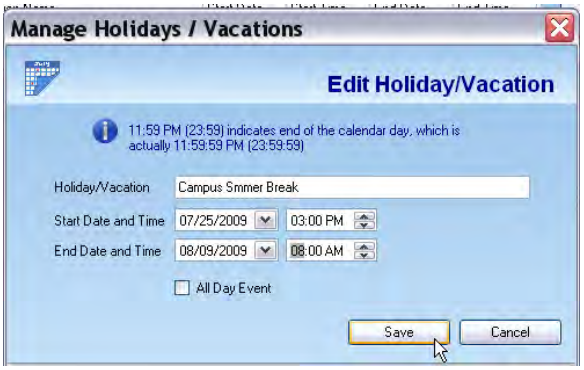


Note: *You can add additional holidays or vacation blocks at any time.*

Editing a Holiday/Vacation

Complete the following steps to edit a holiday/vacation.

- From the **Manage Holidays/Vacations** window, select the holiday or vacation you want to edit.
- Click **Edit**. The software displays the **Edit Holiday/Vacation** window.



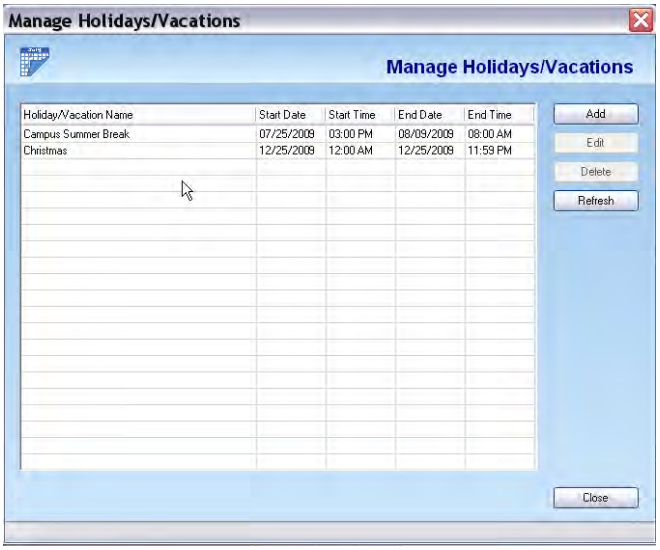
- In the **Holiday/Vacation** name field, change the name of the holiday or vacation, if necessary.
- Clear the **All Day Event** check box if the holiday or vacation you are changing is NOT an all day event (24 hours).
- In the **Start Date** field, change the start date, if necessary, using the drop-down list and selecting the date from the calendar.
- In the **Start Time** field, change the start time, if necessary, by using the up and down arrows.

***Note:** The **Start Time** field will be grayed out if the **All Day Event** check box is selected.*

- In the **End Date** field, change the end date, if necessary, using the drop-down arrow and selecting the date from the calendar.
- In the **End Time** field, change the end time, if necessary, by using the up and down arrows.

***Note:** The **End Time** field will be grayed out if the **All Day Event** check box is selected.*

- Click **Save**. The system saves the changes and displays a confirmation message.
- Click **OK**. The system displays the updated **Manage Holidays/Vacation** window.



- Click **Close** to exit the **Manage Holidays/Vacations** window.

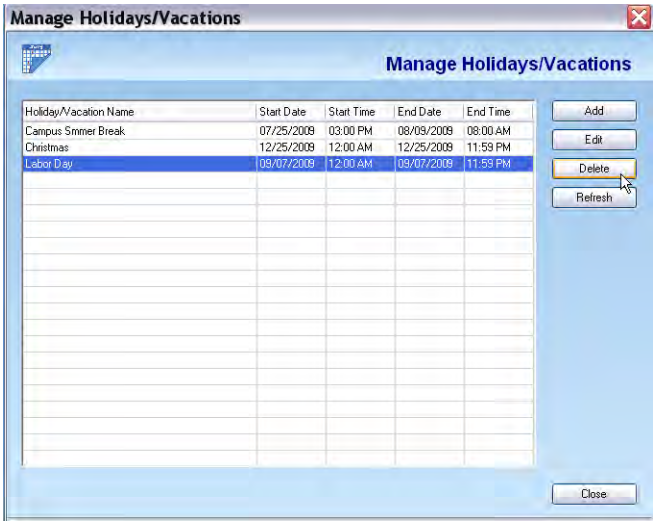
***Note:** You should update your locks to reflect modified holidays/vacations by transferring the changed info to the M-Unit and then uploading/programming the information to the locks. For more information, refer to **M-Unit Handheld** in **Chapter 5, Programming and Auditing Locks**.*

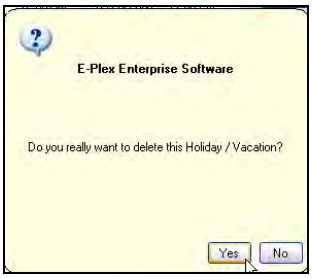
Deleting a Holiday/Vacation

Complete the following steps to delete a holiday/vacation.

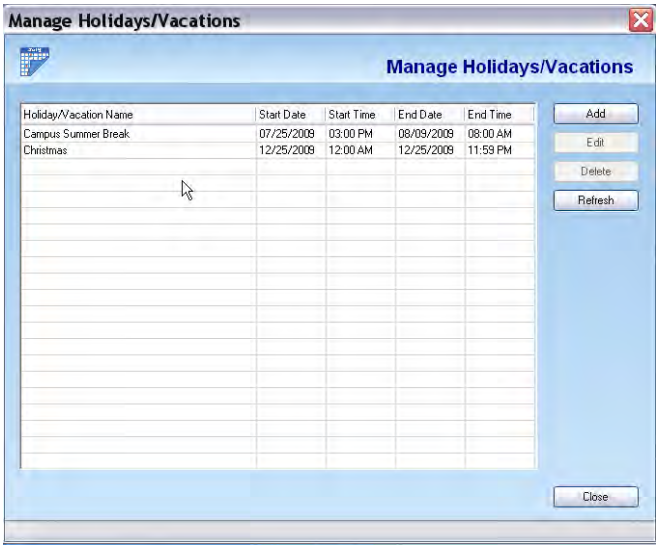
Note: *You cannot delete a holiday or vacation if it is already assigned to a door or doors.*

- From the **Manage Holidays/Vacations** window, select the holiday or vacation to delete.
- Click **Delete**. The software prompts for confirmation.





- Click **Yes** to confirm. The software displays the updated **Manage Holidays/Vacations** window.



- Click **Close** to exit the **Manage Holidays/Vacations** window.

Managing Door Groups

Door groups provide a way to manage multiple doors at a site. The Enterprise software allows Operators to group doors according to any criteria.

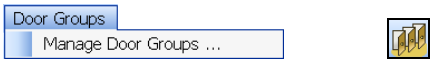
For example, your site may be a small college campus where you will be installing Enterprise driven E-Plex locks in say, three different buildings. In this case, you can create three different door groups and name them Admin Bldg, Library and Supplies Depot. Or, if you prefer you can create many different door groups within one building – for example, door groups named Staff Offices, Common Area, Recreation Center, Theater, Labs etc inside the Admin Bldg.

The system allows you to manage door groups from the **Door Groups** menu.

Important: When creating a new door group, you will be prompted to assign one (and only one) Door Group Manager for this door group. The DG Manager will have complete control over all the locks/doors belonging to this door group, ie., the DG Manager will be just like the global Master user, but in this door group only.

Note: *You can define any number of door groups in the database.*

- To manage door groups, select **Manage Door Groups** from the **Door Groups** menu, or click the **Manage Door Groups** button.



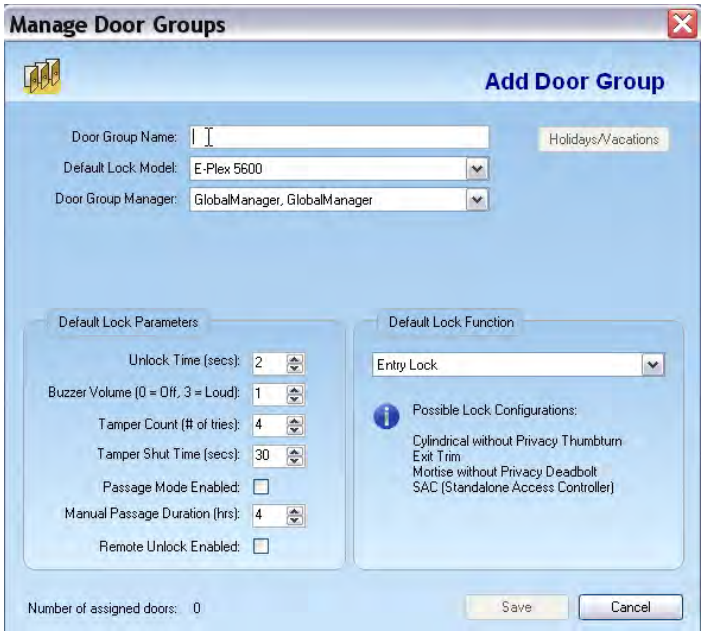
- The software displays the **Manage Door Groups** window. From this window, you can add, edit, or delete door groups. By default, there already exists a Door Group called “Default” belonging to a default Door Group Manager called “GlobalManager”. You can edit the name of this Door Group (and this Manager’s name under Users menu, shown later) to suit your site’s needs.

Adding a Door Group

Complete the following steps to add a door group:

- From the **Manage Door Groups** window, click **Add**. The software displays the **Add Door**

Group window as shown below.

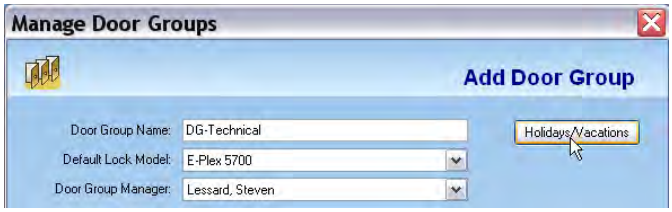


- In the **Door Group Name** field, type the name of the door group you are adding.

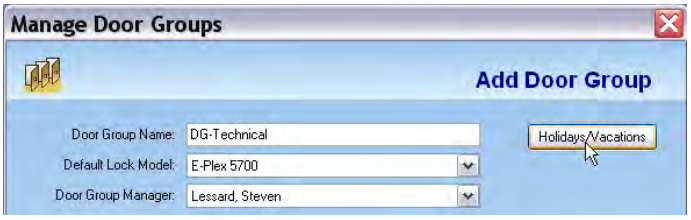
Note1 : *The door group name can be a maximum of 20 alphanumeric characters and no spaces and special characters are allowed, except for the "-" character.*

Note 2: *When you create a new door group, you will be also creating various default parameter values of all the doors/locks that will belong to this door group. However, these default lock parameters can be changed to suit individual door/lock requirement when you create the individual doors later that will belong to this door group.*

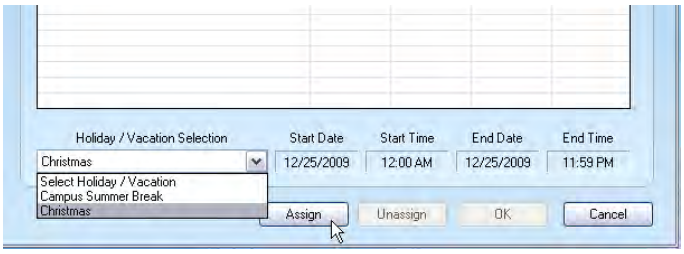
- You may keep the Default Lock Model as is (configured in System Settings earlier) or change it to another lock model from the pick list.
- Select the (single) **Door Group Manager** from the drop-down list; in the very beginning you will have only the default door group manager to choose from the pick list -> GlobalManager. As stated earlier, there can be only one Door Group Manager for this door group from the available any one of the normal Manager users in the system.



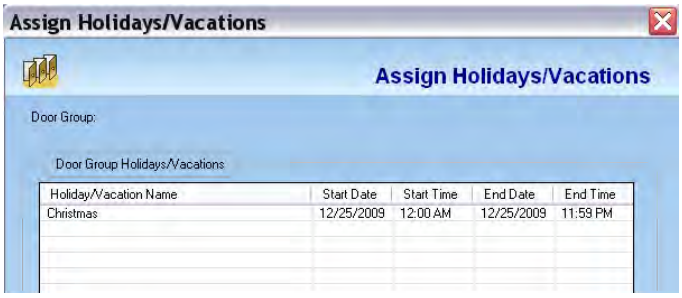
- Click **Holidays/Vacations** to select the holidays and/or vacations to be applied to this door group, if desired. The software displays the **Assign Holidays/Vacations** window.



- Select the desired holiday or vacation block from the **Select Holiday/Vacation** drop-down list at the bottom of the window including the Start and End Dates and Times.



- Click **Assign**. The system displays the assigned holiday or vacation block in the **Door Group Holidays/Vacations** area.



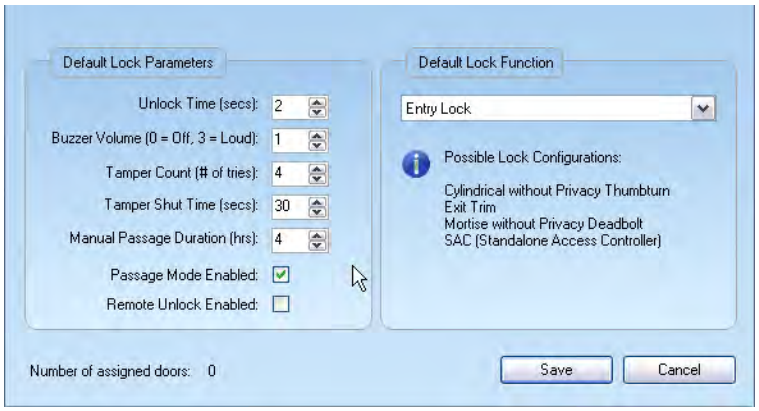
- Click **OK**. The software returns to the **Add Door Group** window. You can assign more holidays/vacation blocks if desired.
- Finally, adjust the following default lock parameters for all locks in this door group, as appropriate, using the up and down arrows:
  - Unlock Time (secs)
  - Buzzer Volume (0 = Off, 3 = Loudest)
  - Tamper Count (# of tries)
  - Tamper Shut Time (secs)
  - Manual Passage Duration (hrs)
- Select **Passage Mode Enabled** option, if you want your locks in this door group to be manually (by the Master and/or by a Manager) or automatically activated/de-activated for free passage at the lock keypad.

Note: *The Passage Mode is automatically and permanently enabled for a lock with "Residence Lock function" and so the passage mode option will be grayed out if the lock function selected is Residence.*

- Select **Remote Unlock Enabled** option, if you need. Note: For this option to work, you must have an E-Plex lock that is electronically pre-configured as such from the factory.
- Select the **Lock Function** from the drop-down list: for an E5xxx series lock as – either Entry (default), Residence or Privacy; and for an E3xxx series lock as – Latch/Exit/Swingbolt.

Note 1: *The Remote Unlock is automatically disabled for a lock with Residence lock function and so this option will be grayed out if the lock function selected is Residence.*

Note 2: *For instructions on how to setup a Lock Function in an actual E-Plex lock and what each Lock Function means, please refer to the* ***"E-Plex 5x00 (and 3x00) Lock Function Setup Guide"*** *that came with the lock in the lock box. By default, all locks come out of the factory whose lock function is pre-configured as "Entry (5x00) or Latch (3x00)" lock function.*



- Click **Save**. The system saves the changes and displays a confirmation message.
- Click **OK**. The software displays the updated **Manage Door Groups** window.

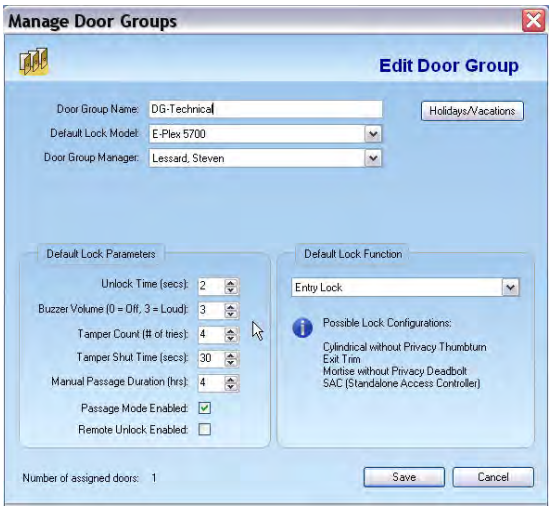
- Click **OK**. The software displays the updated **Manage Door Groups** window.

Note: *You can add additional door groups at any time.*

Editing a Door Group

Complete the following steps to edit a door group:

- From the **Manage Door Groups** window, select a door group to edit.
- Click **Edit**. The software displays the **Edit Door Group** window.



- Edit any or all required fields that you want changed.
- Click **Save**. The system saves the changes and displays a confirmation message.

- Click **OK**. The software displays the updated **Manage Door Groups** window.

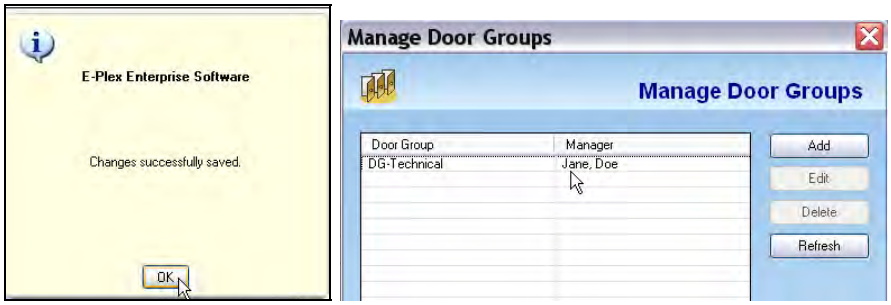
Note: *You should update your locks whose parameters have been modified, first by downloading the affected locks' configuration data to the M-Unit and then by programming / uploading this information to the locks.*

Managing Door Group Managers

Complete the following steps to manage door group managers:

- From the **Manage Door Groups** window, select the Door Group name where you want to change the DG Manager from the current person to a different person and then click **Edit.** Select the Manager you want to assign as the (one and only) DG Manager for this entire Door Group.

- Click **Save** and then **OK**. The software displays the updated **Manage Door Group Manager** window.



- Click **Close** to exit from this dialog.

Deleting a Door Group

Complete the following steps to delete a door group:

- From the **Manage Door Groups** window, select a door group to delete and then click **Delete**. If there is a door or doors that still belong to this door group, you will get the following warning message.

E-Plex Enterprise Software
This Door Group contains Doors which must be, either unassigned and moved to a different Door Group, or must be deleted from the database first.
OK

Note: You cannot delete a door group if it contains locks/doors within this group. You must either unassign all these doors from this door group and move them to a different door group, or must delete them all from the database. Only after this will you be able to delete this particular door group from the database.

- Perform operation(s) as per the message above, if required and then perform the delete operation of this door group.
- The software prompts you for confirmation.

- Click **Yes**. The software displays the updated **Manage Door Groups** window.
- Click **Close** to exit the **Manage Door Groups** window.

Note: *You should update your locks to reflect modified door groups by programming the M-Unit and uploading the information to the locks. For more information, refer to* ***M-Unit Handheld*** *in* **Chapter 5, *Programming and Auditing Locks***.

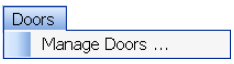
Managing Doors

In the Enterprise software, doors are literally the physical doors at your site where the applicable E-Plex locks are installed. You can define new doors, edit parameters of doors and delete existing doors from the database.

The software allows you to manage doors through the **Manage Doors** menu.

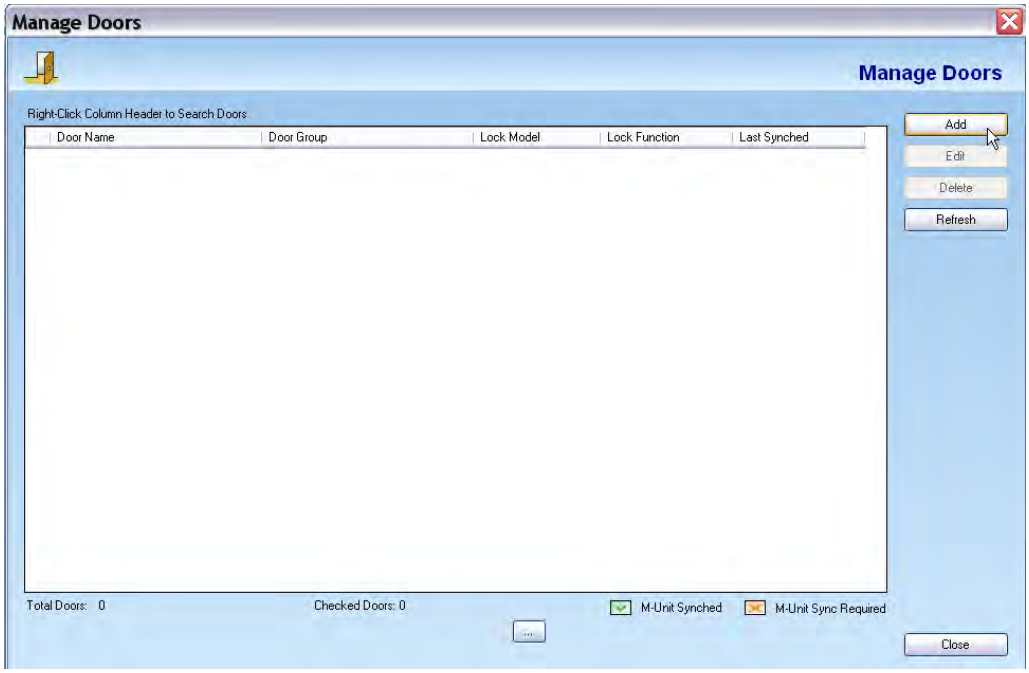
Note: *You can define unlimited number of doors in the database.*

To manage doors, select **Manage Doors** from the **Door** menu, or click the **Manage Doors** button.



Note: The system will alert you if there is no Door Group already created in the system, in which case you must create one.

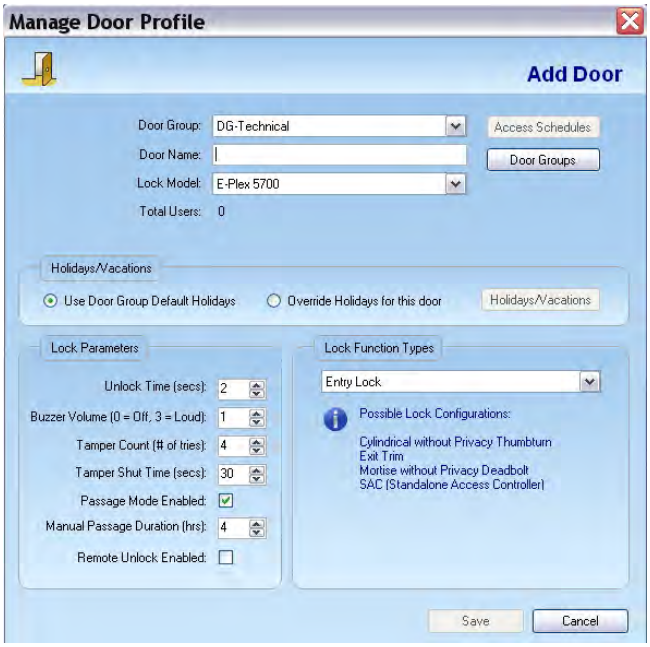
Click **OK**. The software displays the **Manage Doors** window.



Adding a Door

Complete the following steps to add a door:

- From the **Manage Doors** window, click **Add**. The software displays the **Add Door** window.



- Select a **Door Group** from the drop-down list.

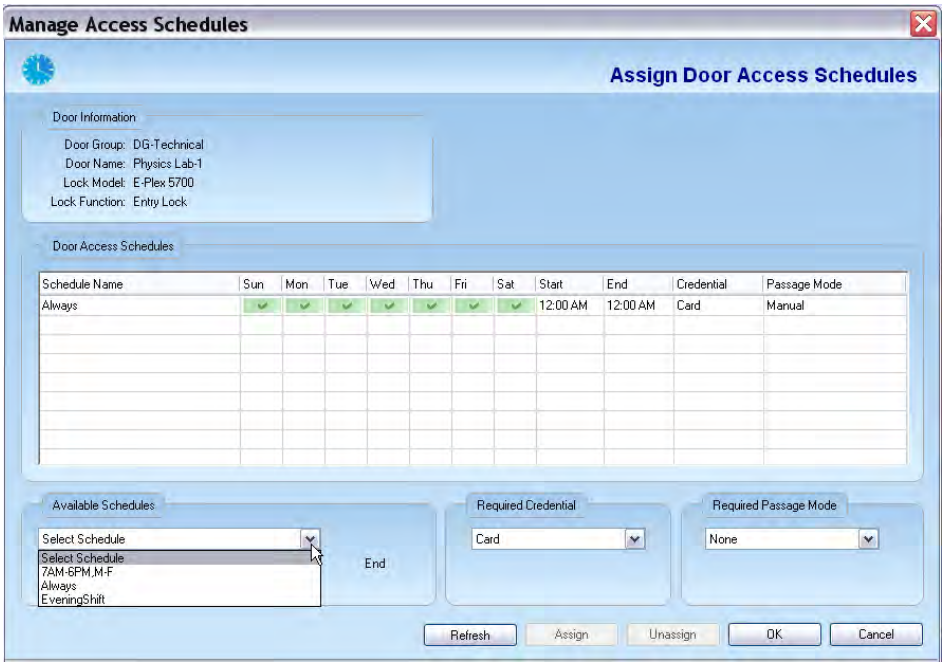
  Note: Depending on the door group name you selected here, all the default lock parameter values of this door will be exactly the same values as those in this door group since they are derived from this door group. However, you can change any or all lock parameter values for this door, if preferred.

- In the **Door Name** field, type the door name.

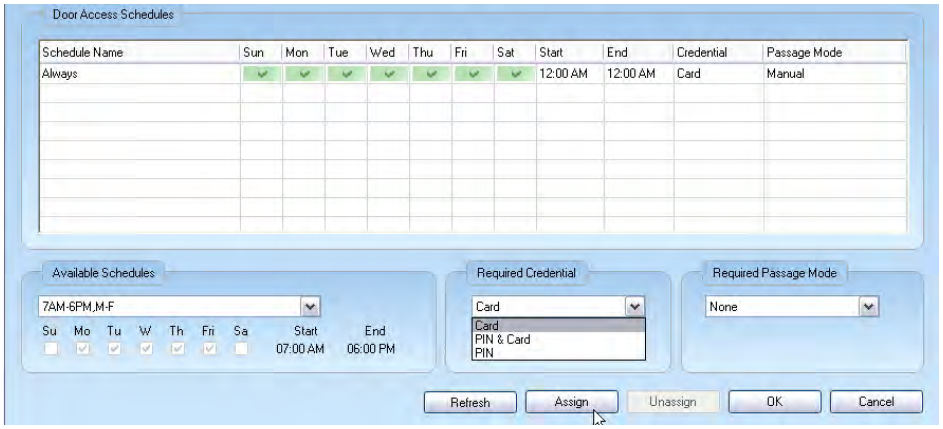
Note: *A door name can be a maximum of 20 alphanumeric characters and no spaces and special characters are allowed, except for the "-" character.*

- Click **Access Schedules** to select the schedules that were previously created under the Manage Schedules menu. Assign schedules to this door so that during this time the lock will grant access to valid users. The software displays the **Assign Door Access Schedules** window.
- Select an **Available Schedules** from the drop-down list at the bottom of the window. The software displays the schedules in the **Door Access Schedules** pane.

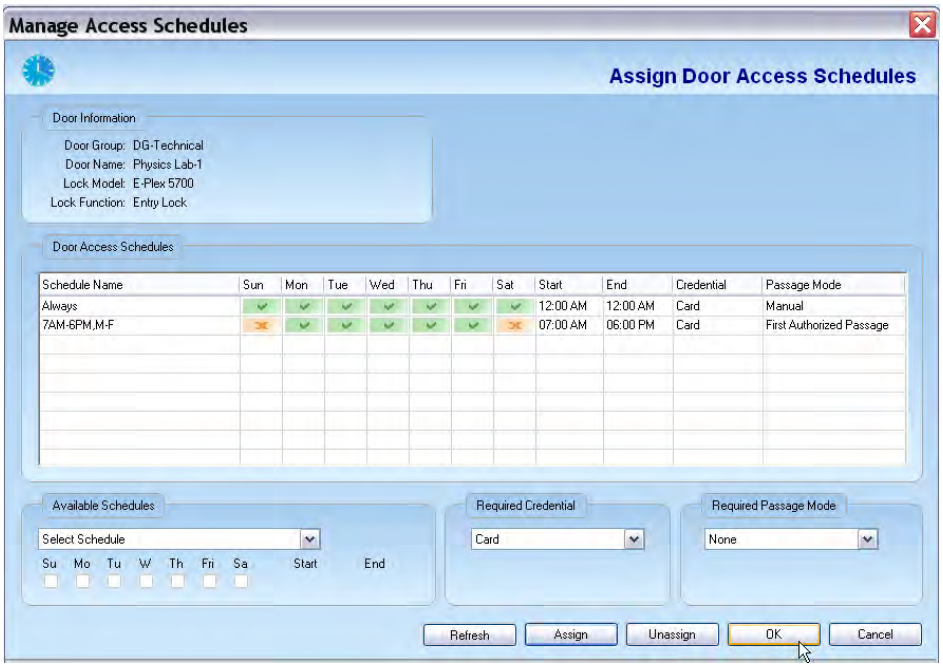
Note: *Once a schedule is highlighted, the* ***Available Schedules*** *area becomes grayed out.*



- Select the **Required Credential** – PIN access, or Card access or PIN & Card access during this selected schedule from the drop-down list.
- Select one of the four **Required Passage** Mode options from the drop down list, either (i) None – ie., the lock never grants free passage, (ii) Automatic – ie., the lock automatically enters free passage at the start of this schedule and locks back at the end of the schedule automatically, (iii) First Authorized Passage – ie., the lock goes into free passage, only after a valid "privileged" user opens it with her/his credential at or after the start of this schedule, or (iv) Manual – ie., only the Master or the Manager users can manually set/reset the free passage at the lock keypad between the start and end times of this schedule for the Manual Passage mode duration set in the software.



- Click **Assign**. The software displays the assigned schedule in the **Door Access Schedules** pane.

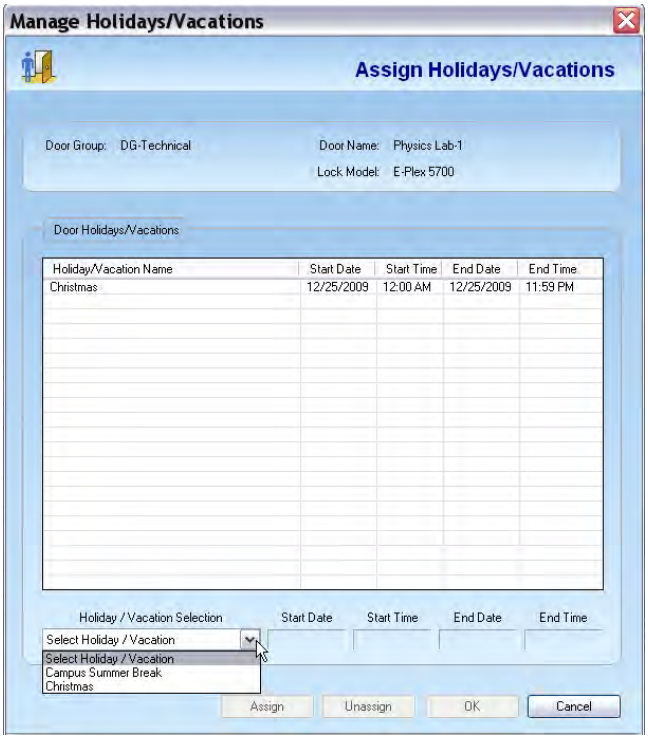


Note: *After a schedule is assigned to the door, the drop-down lists return to their default settings.*

- Click **OK**. The system displays the **Edit Door** window.
- Select the appropriate **Holidays/Vacations** settings:
  - **Use Door Group Default Holidays,** if you are happy with the holiday setting previously set under the Manage Door Groups menu where this lock belongs.
  - **Override Holidays for this door,** if you want to change the previously setup holiday settings under the Manage Door Group menu.

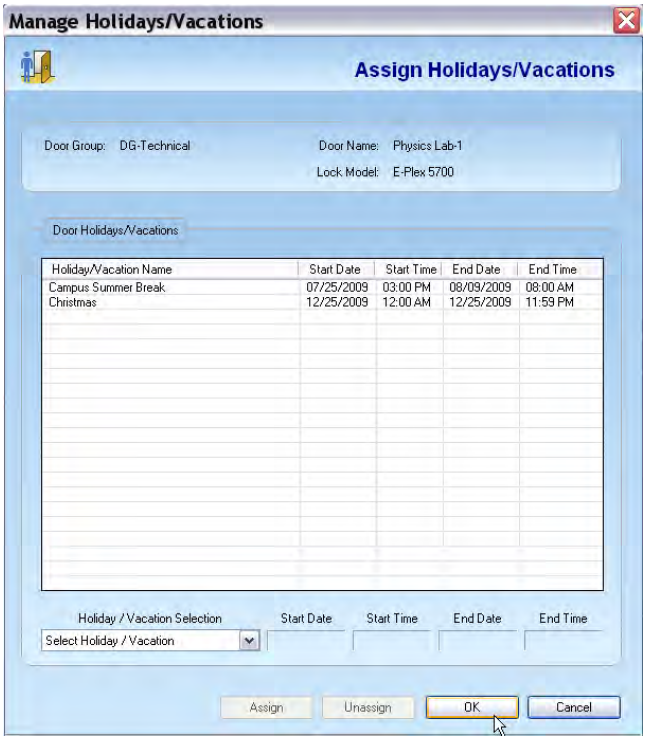
Note: *When **Use Door Group Default Holidays** is selected, the Holidays/Vacations button is grayed out.*

- If **Override Holidays for this door** is selected, click **Holidays/Vacations**. The software displays the **Assign Holidays/Vacations** window.



Note: *By default, the window displays the holidays/vacations associated with the door group for this door.*

- Select the appropriate holiday or vacation period from the **Holiday/Vacation Selection** drop-down list at the bottom of the window. The software displays the **Start Date**, **Start Time**, **End Date**, and **End Time**.
- Click **Assign**. The system displays the holiday or vacation in the **Door Holidays/Vacations** area.



- Click **OK**. The software displays the **Add Door** window.
- Adjust the following default parameters, as appropriate, using the up and down arrows:
  - Unlock Time (secs)
  - Buzzer Volume (0 = Off, 3 = Loudest)
  - Tamper Count (# of tries)
  - Tamper Shut Time (secs)

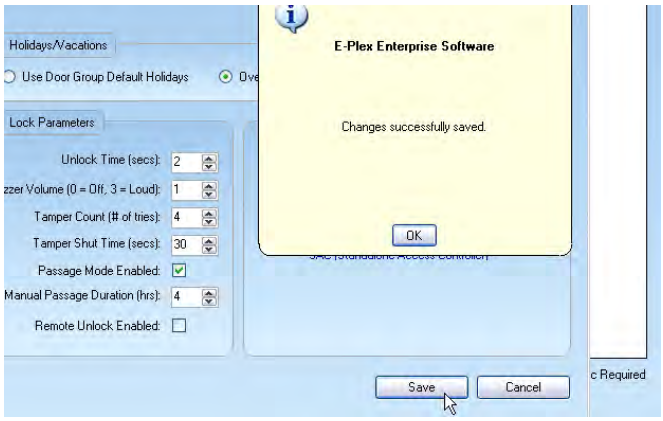
Note: *The available Tamper Shut Time values range between 0 and 90 seconds. Zero means the lock will never go into a tamper shutdown mode; the default is 30 seconds.*

  - Manual Passage Duration (hrs)
    - Select **Passage Mode Enabled**, and enable it, if you required free passage in this lock.
  - Select **Remote Unlock Enabled**, and enable it, if you have this option in the lock hardware.
  - Select one of the applicable **Lock Function Types** for this lock model from the drop-down list.

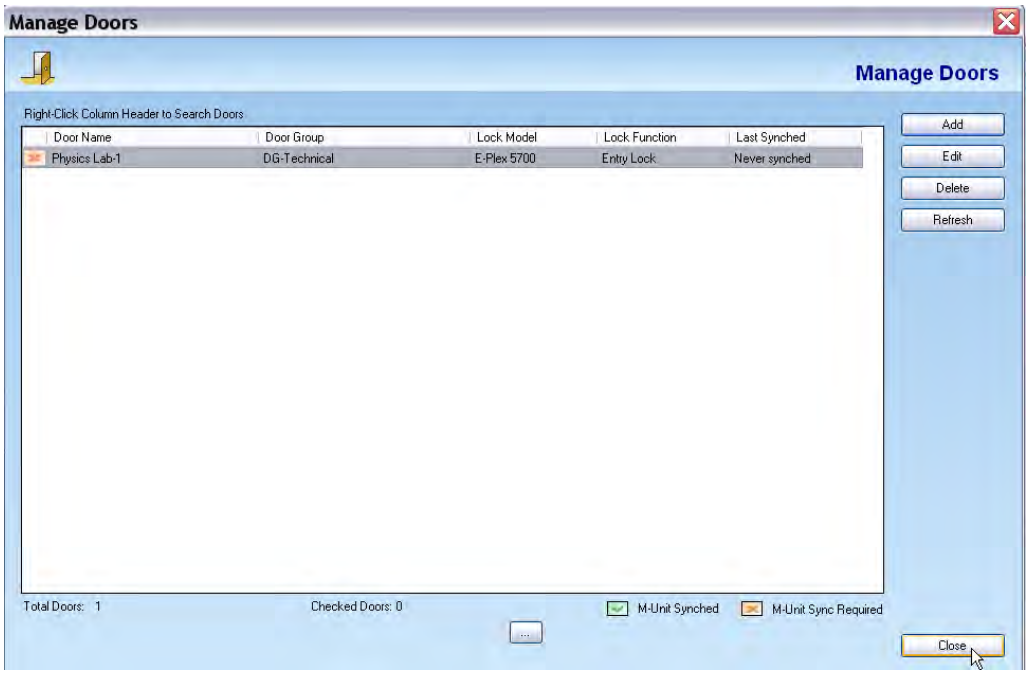
Note: *For each lock function, a different possible lock configuration(s) will be displayed.*

Note: *Refer to the separate "E-Plex 5X00 and 3x00 Lock Function Setup Guide" for instructions on setting up the desired BHMA lock function at the lock itself.*

- Click **Save**. The system saves the changes and displays a confirmation message.



- Click **OK**. The software displays the updated **Manage Doors** window.



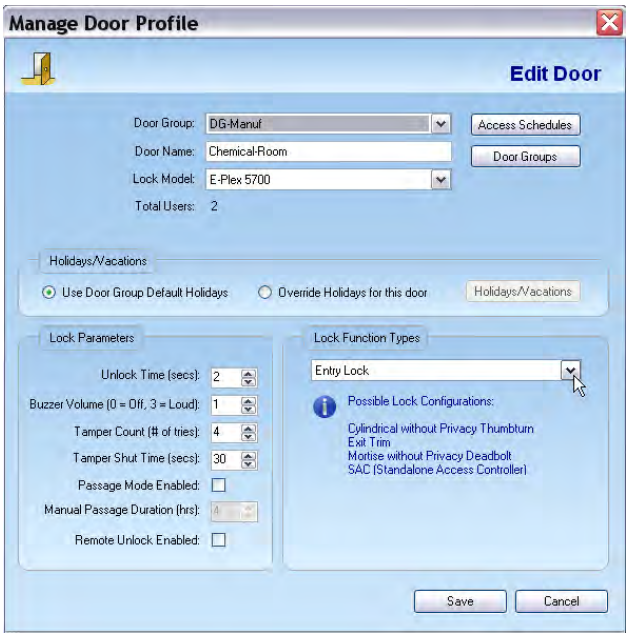
Note: *You will see an orange color "X" symbol against the Door Name in the very first column indicating that this door configuration data needs to be synchronized with (transferred to) the M-Unit PDA before programming this door. Once sync'd with the PDA, the orange "X" will be replaced with a green "check" symbol for this door.*

You can add additional doors at any time.

Editing a Door

Complete the following steps to edit a door:

- From the **Manage Doors** window, select a door to edit.
- Click **Edit**. The software displays the **Edit Door** window.



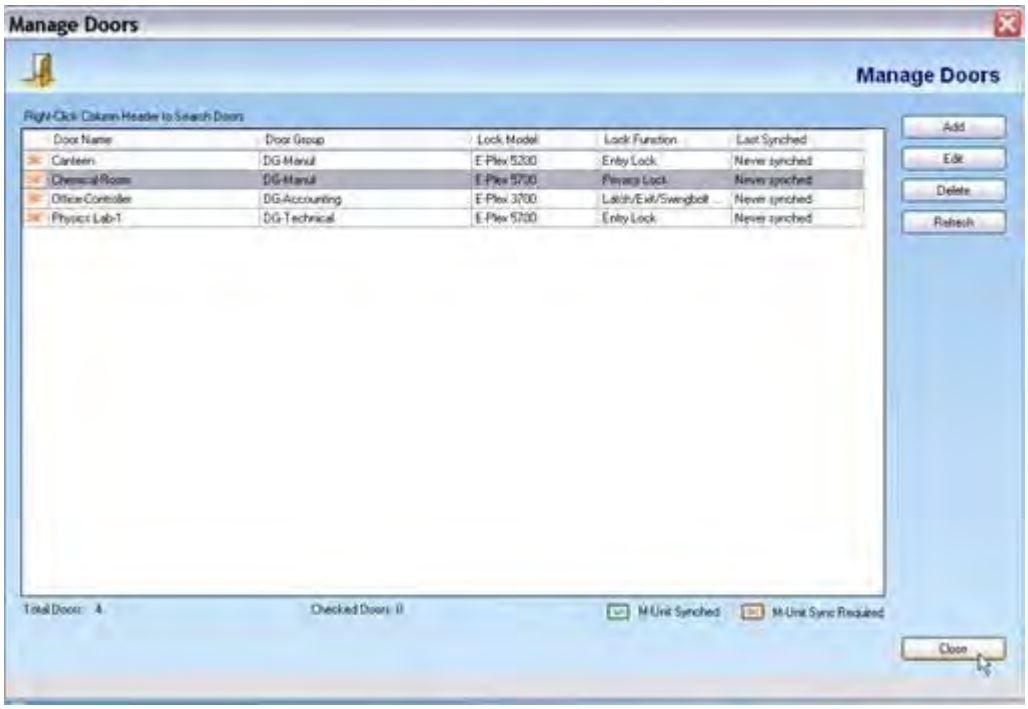
- Select a different **Lock Function Type** from the drop-down list, if appropriate.
- Edit any or all required fields that you want changed.

  The software notifies you about the change.

E-Plex Enterprise Software
You have changed the Lock Function Type.
The Passage Mode Type of each Access Schedule
assigned to this door will be modified
to suit the function's profile.
OK

- Click **OK**.
- Click **Save**. The system saves the changes and displays a confirmation message.

- Click **OK** and then **Save**. The software displays the updated **Manage Doors** window.

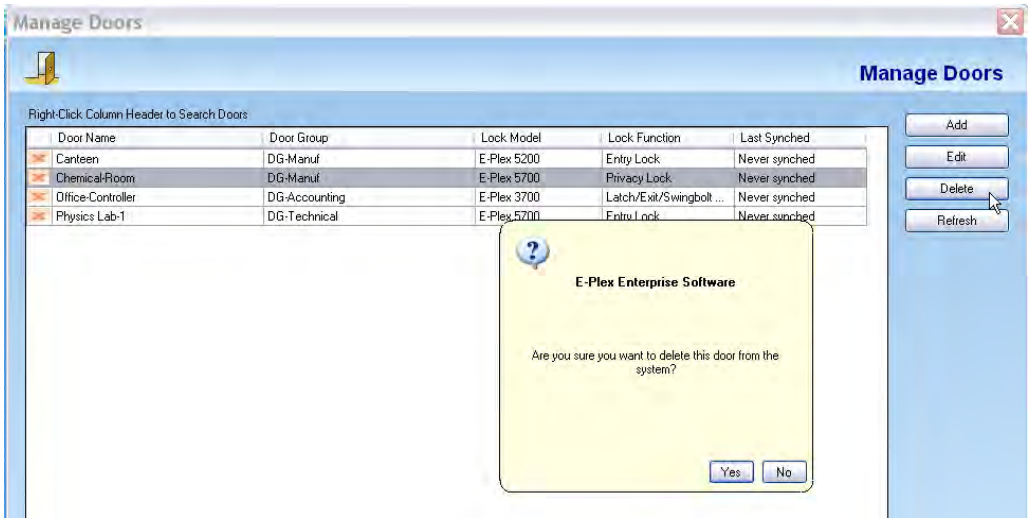


Note: *You should update your locks to reflect modified doors by programming the M-Unit and uploading the information to the locks. For more information, refer to* ***Portable PC M-Unit*** section *in* **Chapter 5**, ***Programming and Auditing Locks***.

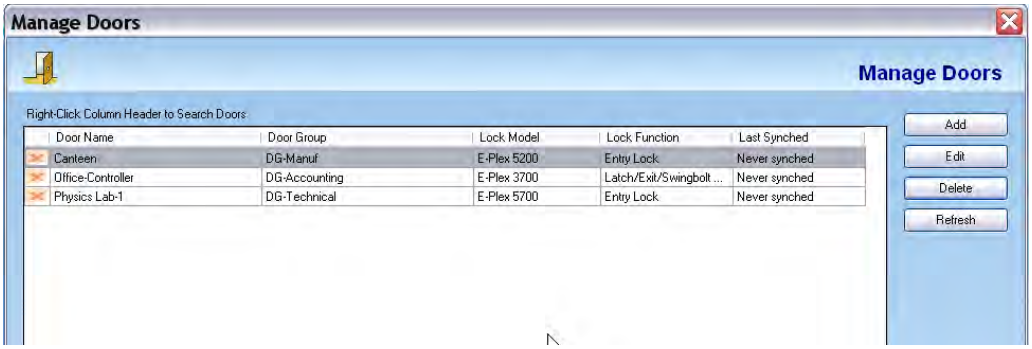
Deleting a Door

Complete the following steps to delete a door:

- From the **Manage Doors** window, select a door to delete.
- Click **Delete**. The system prompts you for confirmation.



- Click **Yes**. The door is deleted and the software displays the updated **Manage Doors** window.



- Click **Close** to exit the **Manage Doors** window and return to the Main Menu.

Note: *You should update your locks to reflect modified doors by programming the M-Unit and uploading the information to the locks. For more information, refer to* ***Portable M-Unit*** *in* **Chapter 5**, ***Programming and Auditing Locks***.

Managing Access Groups

In the Enterprise software, you can group a bunch of doors with their own schedules and credential access types (ie,PIN only, Card only or PIN & Card) etc in an Access Group This makes it extremely efficient when you need to add a new employee/user in the system, as shown in one of the following chapters under "*Managing Users*" dialog menu – ie., with one selection in the *Managing User* menu dialog, you can assign access rights to this new user in all those various doors contained under one Access Group.

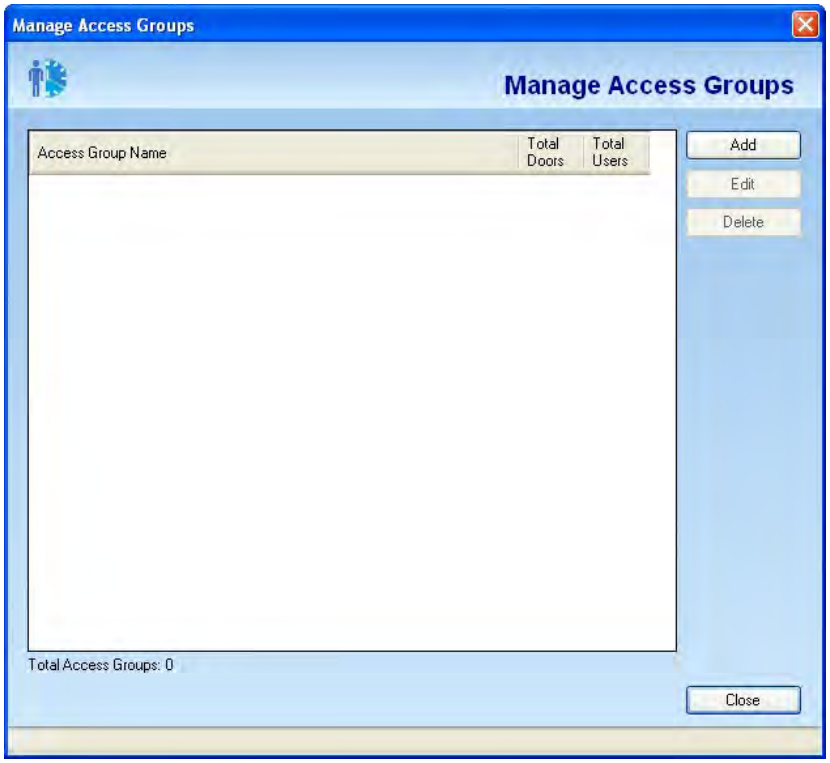
Note: *You can assign any number of access groups in the database.*

To manage access groups, select **Manage Access Groups** from the **Access Groups** menu or click the **Manage Access Groups** button.

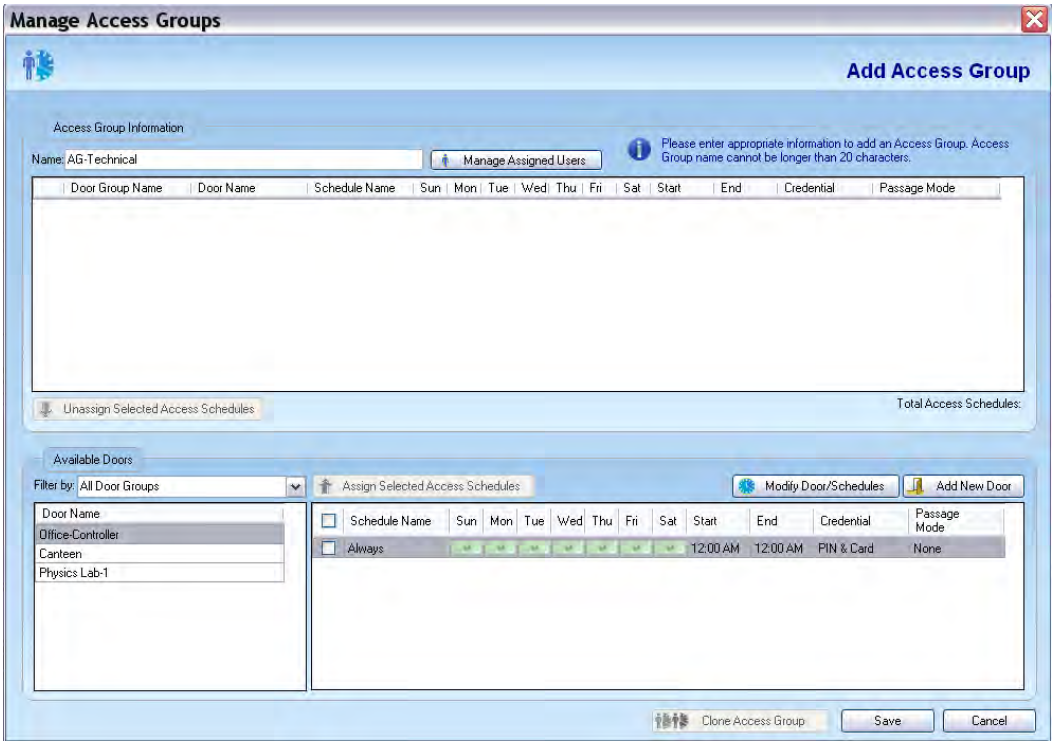
The software displays the **Manage Access Groups** window.

Complete the following steps to add an access group:

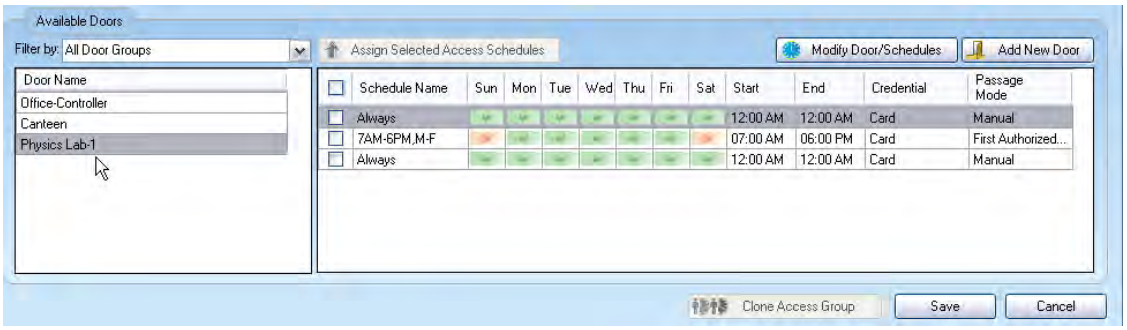
- From the **Manage Access Groups** window, click **Add**.



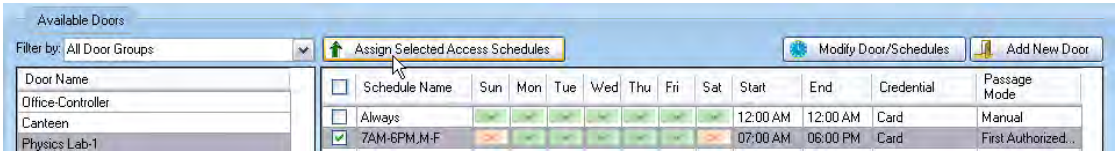
- The software displays the **Add Access Group** window.
- At the top left panel of the screen, enter the name of this new access group (of doors with access schedules and credential types) you are going to create; Eg: AG-TechStaff.
- The bottom half panel of the screen shows all available doors that can be assigned to this new access group.


Manage Access Groups
Add Access Group
Access Group Information
Name: AG-Technical
Manage Assigned Users
Please enter appropriate information to add an Access Group. Access Group name cannot be longer than 20 characters.
Door Group Name | Door Name | Schedule Name | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Start | End | Credential | Passage Mode
Unassign Selected Access Schedules
Total Access Schedules:
Available Doors
Filter by: All Door Groups
Assign Selected Access Schedules
Modify Door/Schedules
Add New Door
Door Name
Office-Controller
Canteen
Physics Lab-1
Schedule Name | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Start | End | Credential | Passage Mode
Always | 12:00 AM | 12:00 AM | PIN & Card | None
Clone Access Group
Save
Cancel

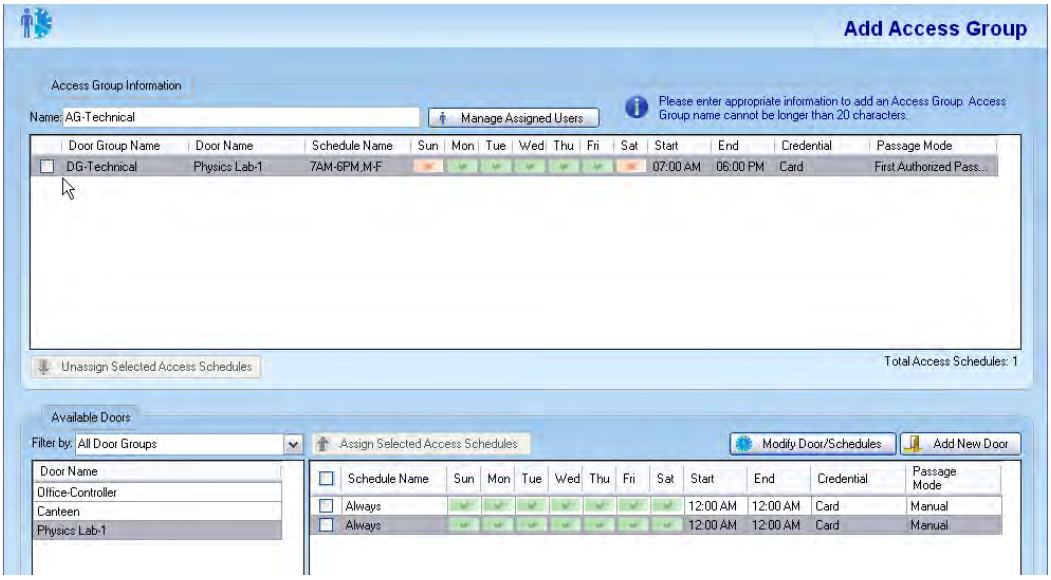
- Select one door at a time; for the selected door on the right side, you will see the access schedules and credential types that have been already assigned to this door, earlier.


Available Doors
Filter by: All Door Groups
Assign Selected Access Schedules
Modify Door/Schedules
Add New Door
Door Name
Office-Controller
Canteen
Physics Lab-1
Schedule Name | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Start | End | Credential | Passage Mode
Always | 12:00 AM | 12:00 AM | Card | Manual
7AM-6PM,M-F | 07:00 AM | 06:00 PM | Card | First Authorized...
Always | 12:00 AM | 12:00 AM | Card | Manual
Clone Access Group
Save
Cancel

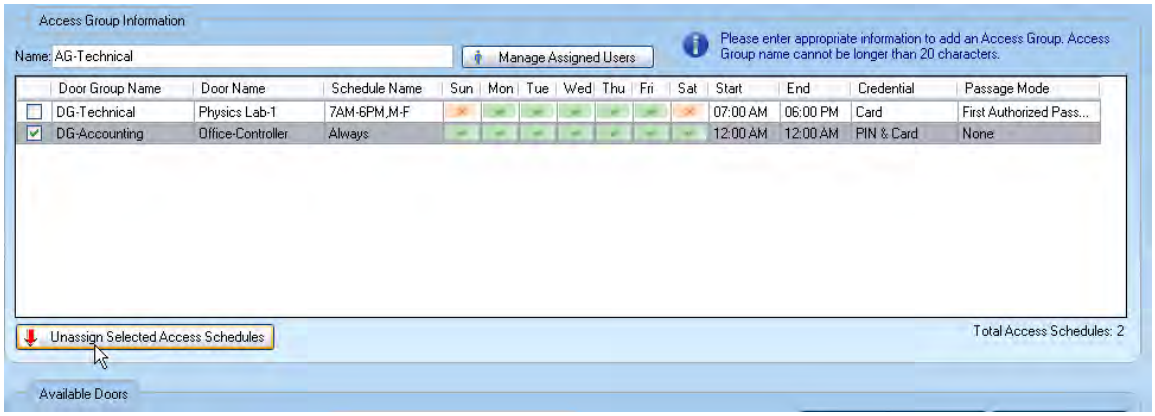
- Select the required access schedule(s) for this door by checking the box(s) against it/them and click on **Assign Selected Access Schedules** tab.


Available Doors
Filter by: All Door Groups
Assign Selected Access Schedules
Modify Door/Schedules
Add New Door
Door Name
Office-Controller
Canteen
Physics Lab-1
Schedule Name | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Start | End | Credential | Passage Mode
Always | 12:00 AM | 12:00 AM | Card | Manual
7AM-6PM,M-F | 07:00 AM | 06:00 PM | Card | First Authorized...

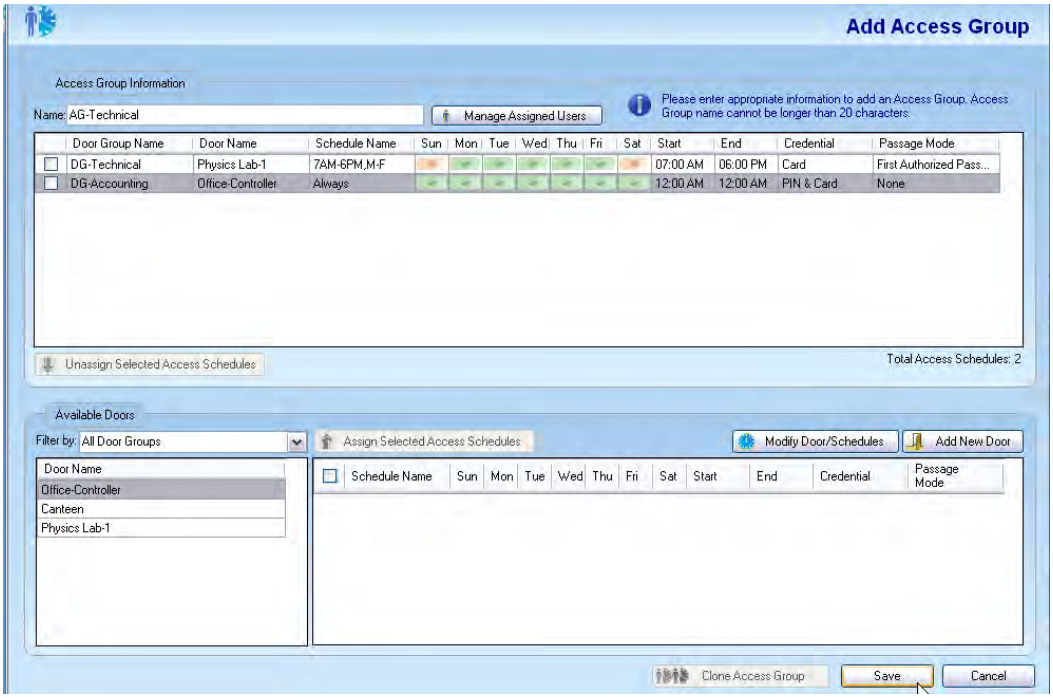
- You will see that this selected door (Physics Lab-1, in this example) with all its parameters is assigned to this access group, as shown at the top left panel.
- Repeat the process by selecting other doors, one at a time to assign them in this access group. If a door has more than one access schedule assigned to it, you can select this door again and select a different schedule(s) for this door and assign it again to the access group.


Add Access Group
Access Group Information
Name: AG-Technical
Manage Assigned Users
Please enter appropriate information to add an Access Group. Access Group name cannot be longer than 20 characters.
Door Group Name | Door Name | Schedule Name | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Start | End | Credential | Passage Mode
DG-Technical | Physics Lab-1 | 7AM-6PM,M-F | 07:00 AM | 06:00 PM | Card | First Authorized Pass...
Unassign Selected Access Schedules
Total Access Schedules: 1
Available Doors
Filter by: All Door Groups
Assign Selected Access Schedules
Modify Door/Schedules
Add New Door
Door Name
Office-Controller
Canteen
Physics Lab-1
Schedule Name | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Start | End | Credential | Passage Mode
Always | 12:00 AM | 12:00 AM | Card | Manual
Always | 12:00 AM | 12:00 AM | Card | Manual

- If you want to un-assign a previously assigned door or doors from this access group, simply check against that box or boxes and click on **Unassign selected Access Schedules**; now these doors will be removed from this access group.


Access Group Information
Name: AG-Technical
Manage Assigned Users
Please enter appropriate information to add an Access Group. Access Group name cannot be longer than 20 characters.
Door Group Name | Door Name | Schedule Name | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Start | End | Credential | Passage Mode
DG-Technical | Physics Lab-1 | 7AM-6PM,M-F | 07:00 AM | 06:00 PM | Card | First Authorized Pass...
DG-Accounting | Office-Controller | Always | 12:00 AM | 12:00 AM | PIN & Card | None
Unassign Selected Access Schedules
Total Access Schedules: 2
Available Doors

- Finally click **Save** and all the doors with their access schedules and credential types assigned to this access group will be saved in the database.

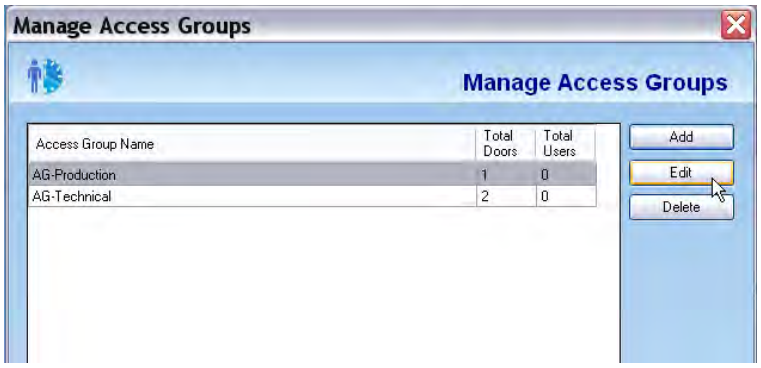

Add Access Group
Access Group Information
Name: AG-Technical
Manage Assigned Users
Please enter appropriate information to add an Access Group. Access Group name cannot be longer than 20 characters.
Door Group Name | Door Name | Schedule Name | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Start | End | Credential | Passage Mode
DG-Technical | Physics Lab-1 | 7AM-6PM,M-F | 07:00 AM | 06:00 PM | Card | First Authorized Pass...
DG-Accounting | Office-Controller | Always | 12:00 AM | 12:00 AM | PIN & Card | None
Unassign Selected Access Schedules
Total Access Schedules: 2
Available Doors
Filter by: All Door Groups
Assign Selected Access Schedules
Modify Door/Schedules
Add New Door
Door Name
Office-Controller
Canteen
Physics Lab-1
Schedule Name | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Start | End | Credential | Passage Mode
Clone Access Group
Save
Cancel

- Click **OK** to finish adding an access group.

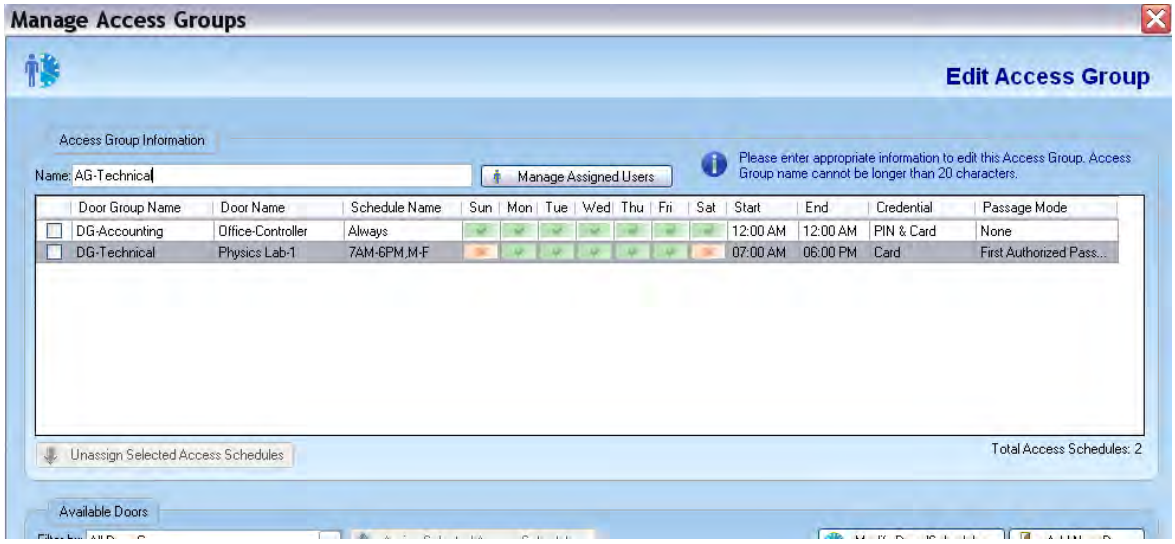
Editing an Access Group

Complete the following steps to edit an access group:

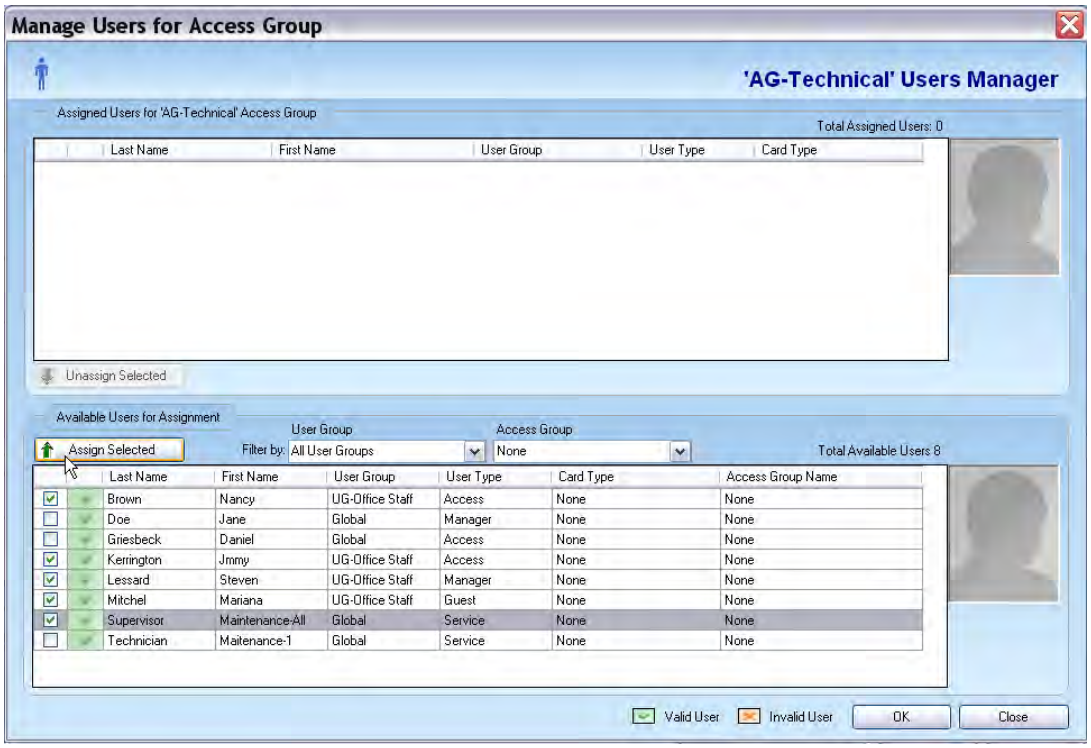
- From the **Manage Access Groups** window, select an access group to edit.
- Click **Edit**. The software displays the **Edit Access Groups** window.



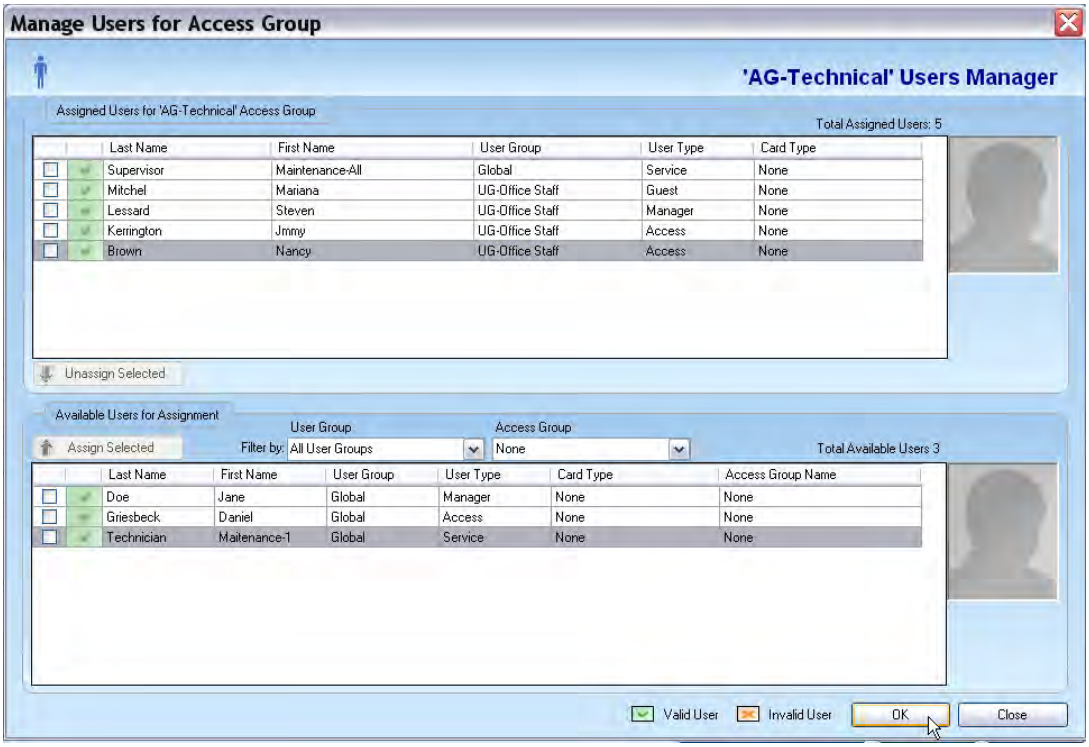
- In addition to editing (adding or removing doors to access group), you can also assign users in the selected access group in this dialog menu. A typical case would be that you had already imported hundreds, if not thousands of users into the database. If that is the case, you can assign any or all of these users to your required Access Group(s) here.
- Click on **Manage Assigned Users** tab on top part of the screen panel.


Manage Access Groups
Edit Access Group
Access Group Information
Name: AG-Technical
Manage Assigned Users
Please enter appropriate information to edit this Access Group. Access Group name cannot be longer than 20 characters.
Door Group Name | Door Name | Schedule Name | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Start | End | Credential | Passage Mode
DG-Accounting | Office-Controller | Always | 12:00 AM | 12:00 AM | PIN & Card | None
DG-Technical | Physics Lab-1 | 7AM-6PM,M-F | 07:00 AM | 06:00 PM | Card | First Authorized Pass...
Unassign Selected Access Schedules
Total Access Schedules: 2
Available Doors

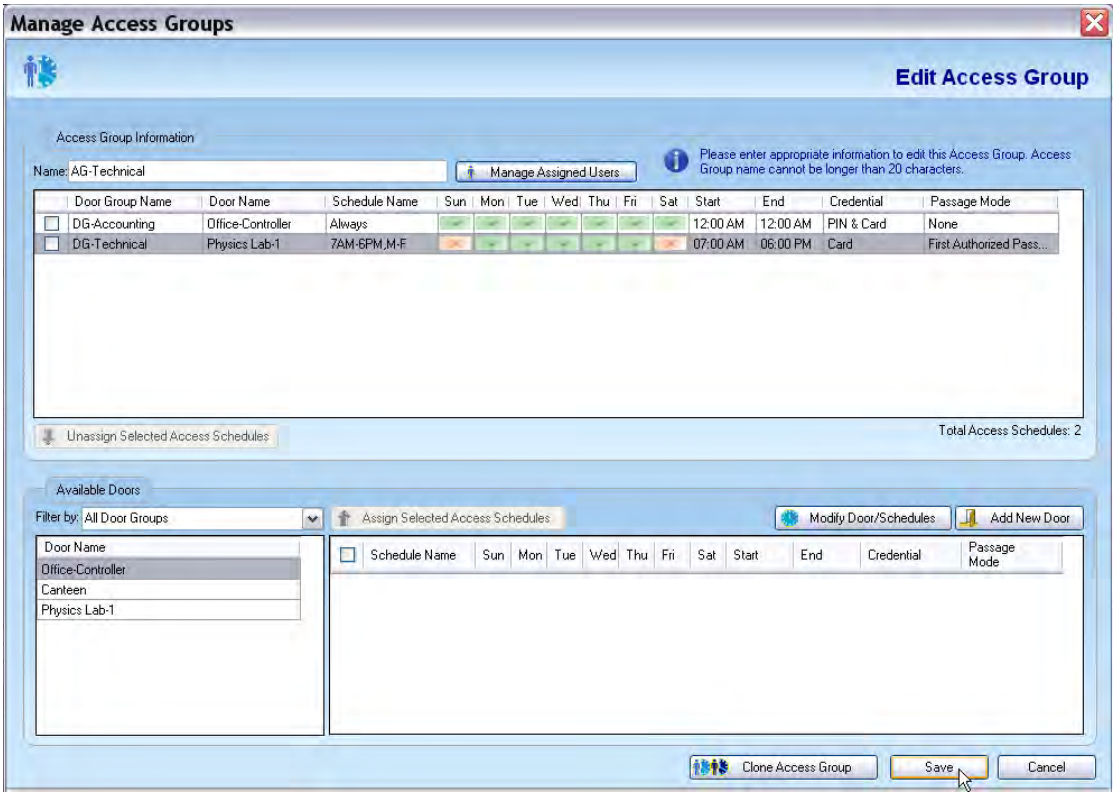
- The following window will open up showing the available users in the system that can be selected and assigned to this access group as shown below.


Manage Users for Access Group
'AG-Technical' Users Manager
Assigned Users for 'AG-Technical' Access Group
Total Assigned Users: 0
Last Name | First Name | User Group | User Type | Card Type
Unassign Selected
Available Users for Assignment
Assign Selected
User Group
Filter by: All User Groups
Access Group
None
Total Available Users 8
Last Name | First Name | User Group | User Type | Card Type | Access Group Name
Brown | Nancy | UG-Office Staff | Access | None | None
Doe | Jane | Global | Manager | None | None
Griesbeck | Daniel | Global | Access | None | None
Kerrington | Jmmy | UG-Office Staff | Access | None | None
Lessard | Steven | UG-Office Staff | Manager | None | None
Mitchel | Mariana | UG-Office Staff | Guest | None | None
Supervisor | Maintenance-All | Global | Service | None | None
Technician | Maitenance-1 | Global | Service | None | None
Valid User
Invalid User
OK
Close

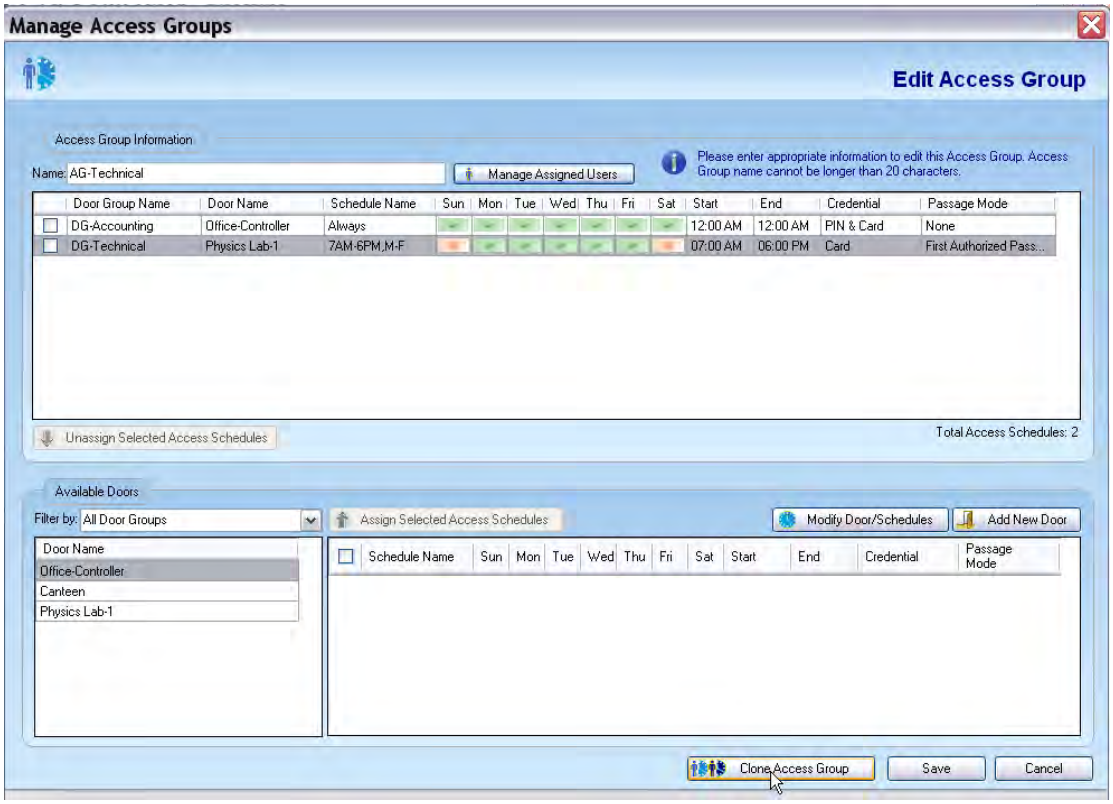
- Select required users by checking the boxes against them and click on **Assign Selected** tab on the left side of the bottom panel. Now all the selected users will be assigned to this access group as shown on the top panel.


Manage Users for Access Group
'AG-Technical' Users Manager
Assigned Users for 'AG-Technical' Access Group
Total Assigned Users: 5
Last Name | First Name | User Group | User Type | Card Type
Supervisor | Maintenance-All | Global | Service | None
Mitchel | Mariana | UG-Office Staff | Guest | None
Lessard | Steven | UG-Office Staff | Manager | None
Kerrington | Jimmy | UG-Office Staff | Access | None
Brown | Nancy | UG-Office Staff | Access | None
Unassign Selected
Available Users for Assignment
Assign Selected
User Group
Filter by: All User Groups
Access Group
None
Total Available Users 3
Last Name | First Name | User Group | User Type | Card Type | Access Group Name
Doe | Jane | Global | Manager | None | None
Griesbeck | Daniel | Global | Access | None | None
Technician | Maitenance-1 | Global | Service | None | None
Valid User
Invalid User
OK
Close

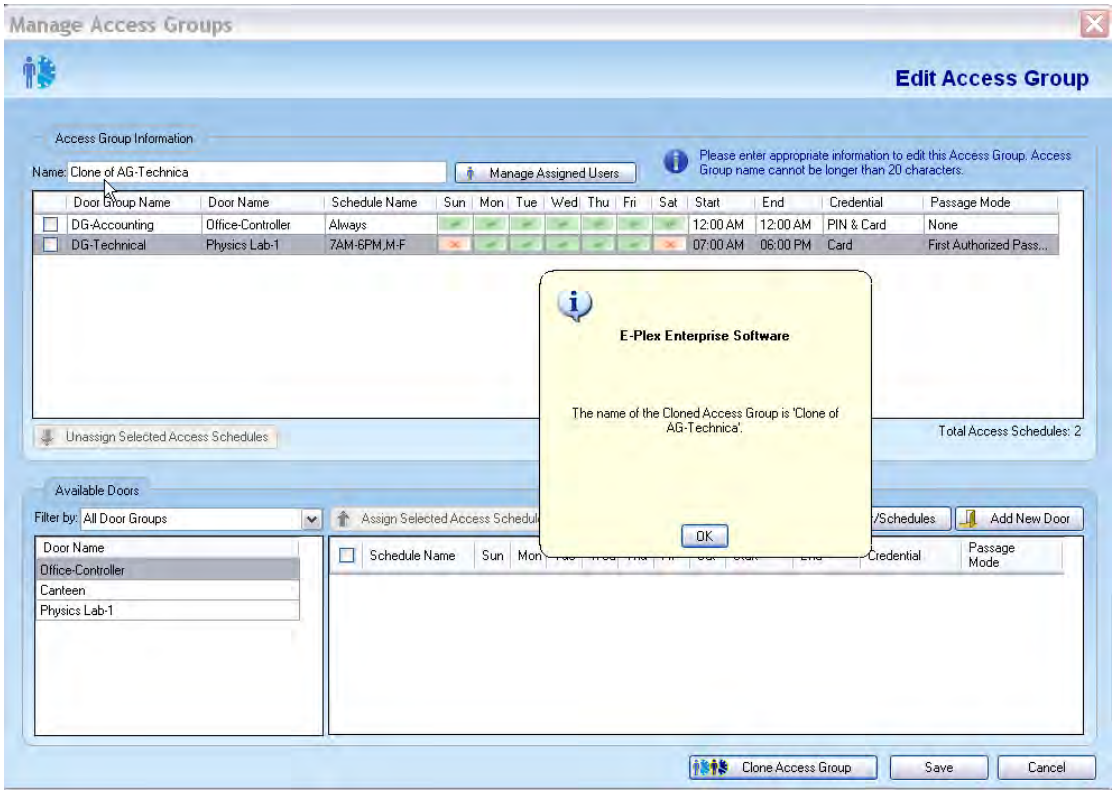
- Click **OK** and then **Save**.


Manage Access Groups
Edit Access Group
Access Group Information
Name: AG-Technical
Manage Assigned Users
Please enter appropriate information to edit this Access Group. Access Group name cannot be longer than 20 characters.
Door Group Name | Door Name | Schedule Name | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Start | End | Credential | Passage Mode
DG-Accounting | Office-Controller | Always | 12:00 AM | 12:00 AM | PIN & Card | None
DG-Technical | Physics Lab-1 | 7AM-6PM,M-F | 07:00 AM | 06:00 PM | Card | First Authorized Pass...
Unassign Selected Access Schedules
Total Access Schedules: 2
Available Doors
Filter by: All Door Groups
Assign Selected Access Schedules
Modify Door/Schedules
Add New Door
Door Name
Office-Controller
Canteen
Physics Lab-1
Schedule Name | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Start | End | Credential | Passage Mode
Clone Access Group
Save
Cancel

- You may also “clone” an existing access group and give it a different name. After cloning, you can easily add or remove doors and/or users in the cloned access group to suit your need.
- Click on **Clone Access Group**.


Manage Access Groups
Edit Access Group
Access Group Information
Name: AG-Technical
Manage Assigned Users
Please enter appropriate information to edit this Access Group. Access Group name cannot be longer than 20 characters.
Door Group Name | Door Name | Schedule Name | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Start | End | Credential | Passage Mode
DG-Accounting | Office-Controller | Always | 12:00 AM | 12:00 AM | PIN & Card | None
DG-Technical | Physics Lab-1 | 7AM-6PM,M-F | 07:00 AM | 06:00 PM | Card | First Authorized Pass...
Unassign Selected Access Schedules
Total Access Schedules: 2
Available Doors
Filter by: All Door Groups
Assign Selected Access Schedules
Modify Door/Schedules
Add New Door
Door Name
Office-Controller
Canteen
Physics Lab-1
Schedule Name | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Start | End | Credential | Passage Mode
Clone Access Group
Save
Cancel

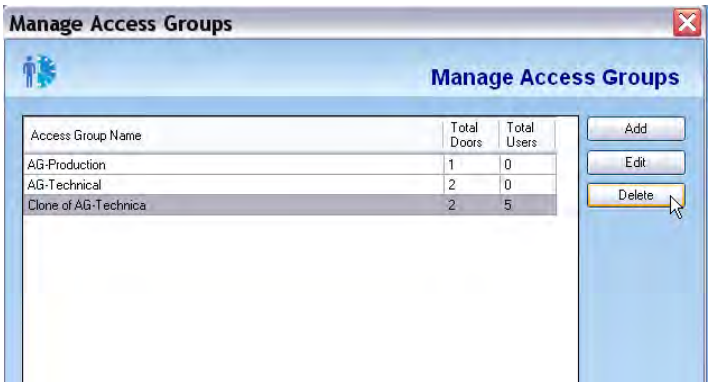
- By default, the system will automatically name this cloned access group as “Clone of xxxxx” where xxxxx is the original name of the access group that was cloned from. You can rename this cloned access group to whatever name you want.
- Click **Save** to save this cloned access group in the database.


Manage Access Groups
Edit Access Group
Access Group Information
Name: Clone of AG-Technica
Manage Assigned Users
Please enter appropriate information to edit this Access Group. Access Group name cannot be longer than 20 characters.
Door Group Name | Door Name | Schedule Name | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Start | End | Credential | Passage Mode
DG-Accounting | Office-Controller | Always | 12:00 AM | 12:00 AM | PIN & Card | None
DG-Technical | Physics Lab-1 | 7AM-6PM,M-F | 07:00 AM | 06:00 PM | Card | First Authorized Pass...
E-Plex Enterprise Software
The name of the Cloned Access Group is 'Clone of AG-Technica'.
OK
Unassign Selected Access Schedules
Total Access Schedules: 2
Available Doors
Filter by: All Door Groups
Add New Door
Door Name
Office-Controller
Canteen
Physics Lab-1
Clone Access Group
Save
Cancel

Deleting an Access Group

Complete the following steps to delete an access group:

- From the **Manage Access Groups** window, select an access group to delete.
- Click **Delete**.



- The system displays the following screen with a message to caution you what will happen when you delete this access group. Click **Yes** if you really intended to delete this access group.

E-Plex Enterprise Software
Are you sure you want to delete this Access Group? If there are any users assigned to this Access Group, their new Access Group will be 'None'. If there are Users assigned to the Doors through this Access Group then these Users will be unassigned from these Doors.
Yes
No

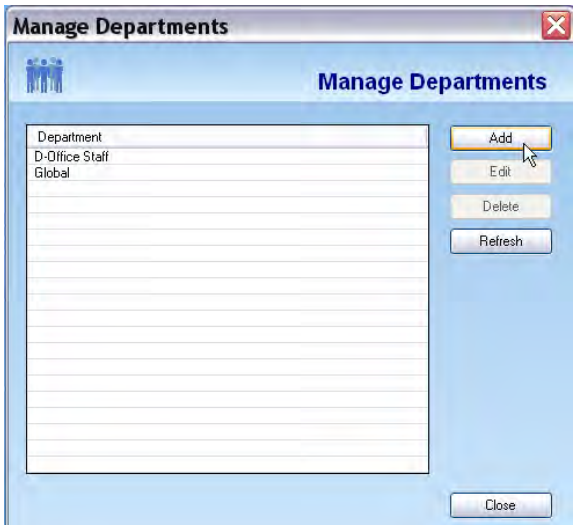
Managing Departments

In the Enterprise software, you can group similar users into user groups like departments. For example, you may have a group of users who can be assigned to a Department called Office Staff. The Department assignment in the software is strictly for operator convenience and does have any other effect in the functionality of the lock or the Enterprise system.

Note: *You can assign any number of Departments in the database. The Department name called "*Global*" is pre-assigned in the system as a default Department. In the E-Plex Enterprise software version 1.x, the "Department" was called "User Group" which means the same thing.*

- To manage Departments, select **Manage Department** from the **Department** menu or click the **Manage Department** button. [Note: In Enterprise 1.x version, the term "User Group" was used to refer to the "Department"; they both mean the same thing].

- The software displays the **Manage Departments** window.



- From this window, you can add, edit, or delete Departments.

Adding a Department

Complete the following steps to add a user group:

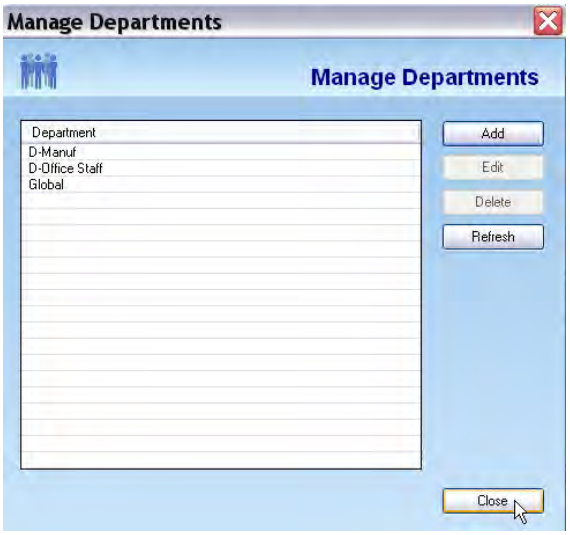
- From the **Manage Department** window, click **Add**. The software displays the **Add Department** window.

- In the **Department Name** field, type the name of the user group you are adding.

Note: *The* ***Department Name*** *can be a maximum of 20 alphanumeric characters and no spaces and special characters are allowed, except for the "-" character.*

Manage Departments
Add Department
Please enter appropriate information to add a department to the system. Department name cannot be longer than 20 characters.
Department Name
D-Manuf
Save
Cancel

- Click **Save**. The system saves the changes and displays a confirmation message.
- Click **OK**. The software displays the new Department (user group) in the **Manage Department** window. Click **Close**.

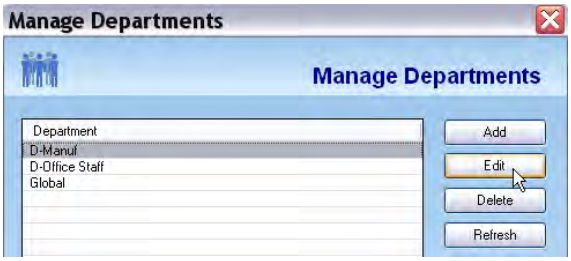


Note: *You can add additional Departments at any time.*

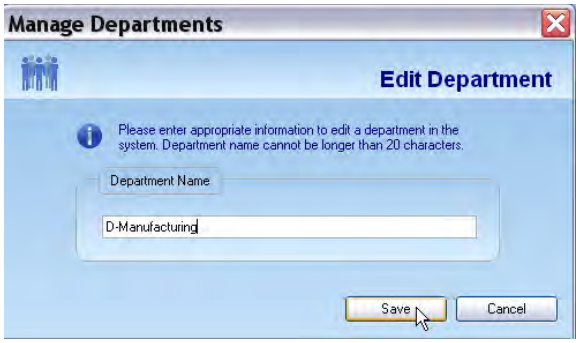
Editing a Department

Complete the following steps to edit a user group.

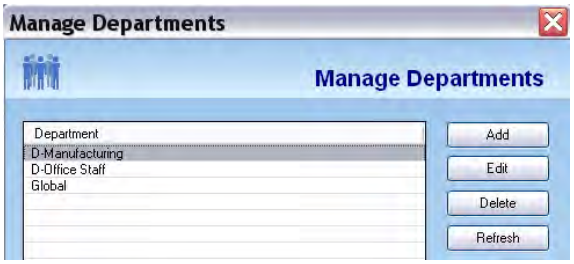
- From the **Manage Department** window, click a user group to edit.
- Click **Edit**. The software displays the **Edit Department** window.



- In the **Department Name** field, change the name of the user group.


Manage Departments
Edit Department
Please enter appropriate information to edit a department in the system. Department name cannot be longer than 20 characters.
Department Name
D-Manufacturing
Save
Cancel

- Click **Save**. The system saves the changes and displays a confirmation message.
- Click **OK**. The software displays the updated **Manage Department** window.



- Click **Close** to exit the **Manage Department** window.

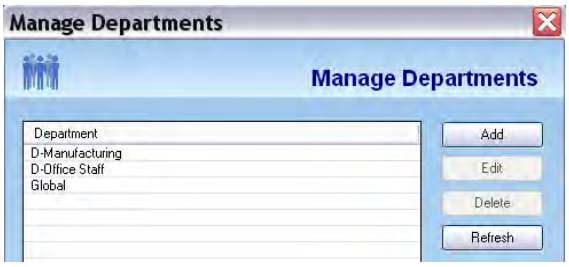
Deleting a Department

Complete the following steps to delete a Department.

- From the **Manage Department** window, select and click a Department to delete. If a Department contains any users in it, you must first delete all these users before able to delete this Department.

- Click **Delete**. The software prompts you for confirmation.

- Click **Yes**. The system displays the updated **Manage Department** window. Click **Close**.



Managing Users

In the Enterprise software, you can add and maintain users and assign their associated PIN. In addition to the PIN, you can also assign a Prox card and/or a smartcard such as iClass, Mifare or DESFire to the user, if this user will be accessing any Prox and/or smartcard based E-Plex locks in the facility. If you will be using smartcards as ID credentials, you must select only one type of smartcard (iClass, or Mifare or DESFire) that you will be using in your facility. That is, each user can be assigned dual card credentials – one is always a Prox but the second one can be only the same type of a smartcard.

Also in this menu, you may assign an *Access Group* to each user, change or delete user information etc.

The Enterprise software allows you to manage users from the **Manage Users** menu.

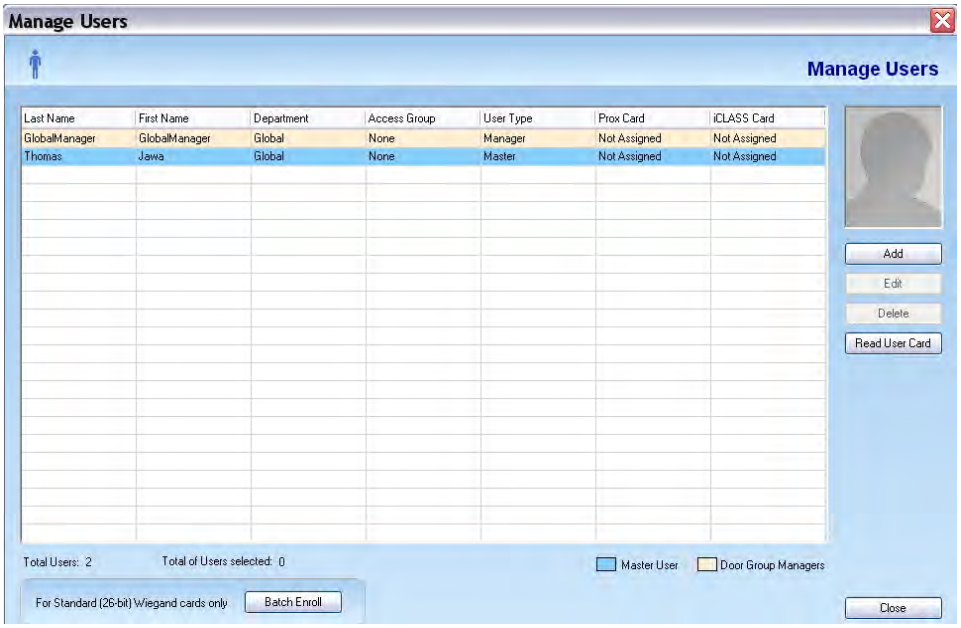
Note: *You can add up to 10,000 users in the database whether all the users are configured to have 4, 5, 6, 7 or 8 digit length PINs. However, you can put a maximum of only 3,000 users in the lock.*

- Select a **Credential Type** that the Master user must use to program and/or audit locks from the drop-down list. By default it is **PIN** only credential, meaning that the Master user needs to enter only her/his 8-digit PIN when programming or auditing the locks. If you choose **PIN & Card** credential for higher security, then the Master will be required to use dual credential (PIN and card), every time s/he accesses the lock for programming or auditing.
- In this example, let us assume that each user of this facility carries two types of ID card credentials -> one of them is a legacy Prox card (works in E3700 & E5700 series locks) and the other one is a smartcard (works in E3600 & E5600 lock series); the smartcard used here is an iClass card.

Note: *The one and only* Master *user and one* Door Group Manager *user are pre-assigned in the system as default users, both belonging to the* Global *Department. The Master user who is also automatically the very first Level-1 Operator cannot be deleted from the system.*

To manage users, select **Manage Users** from the **Users** menu or click the **Manage Users** button.

The software displays the **Manage Users** window.



- From this window, you can add, edit, or delete users. You can “Batch Enroll” the Prox and the iClass cards “en masse”, provided the card data format follows the “standard” 26 bit wiegand card format.
- From this menu, you can also read back a “lost” user’s card.

Adding a User

Complete the following steps to add a user:

Note 1: *Since in this example you will be enrolling user ID cards also – both Prox and iClass, you must ensure that both the Prox token enroller and the smartcard (iClass, in this case) token enroller are properly connected to the PC via two USB ports f the PC before beginning this process.*

Note 2: *A steady red light on each enroller indicates that it is ready to read a token/card. When you present the card close to the top of the enroller, it will turn the red light into green and flash once indicating a successful card read. Additionally in the case of the smartcard enroller, it will also beep to indicate a successful read.*

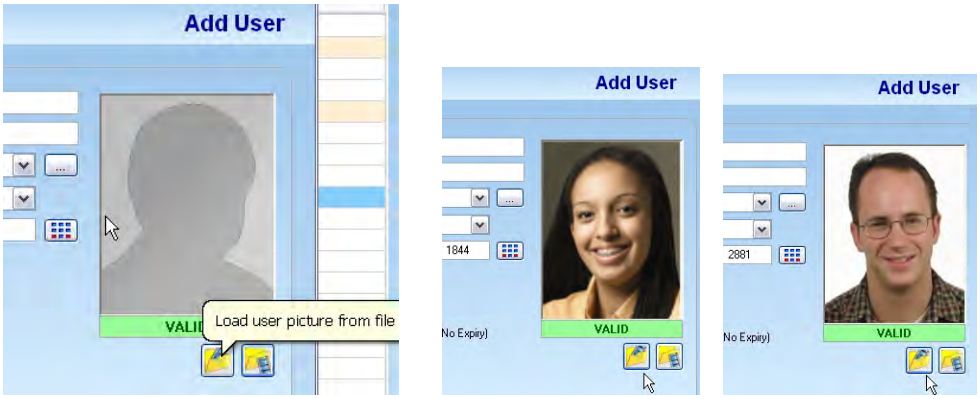
- From the **Manage Users** window, click **Add**. The software displays the **Add User** window.

- In the **Last Name** field, type the last name of the user.
- In the **First Name** field, type the first name of the user.
- From the **Department** drop-down list, select a department.
- From the **Access Group** drop-down list, select an access group that was already created under the *Managing Access Group* menu earlier, or leave it as default “None”.
- From the **User Type** drop-down list, select a user type.

Note: *The* ***User Type*** *field defaults to Access User. The Service user type is PIN only and so does not require any card enrollment.*

- In the **User PIN** field, the user PIN for this user will be automatically generated by the software. The first 4 digits of automatically generated PINs are always unique for security reasons. You can override the PIN by entering a new 4-digit PIN (5, 6, 7 or 8 digit PINs, if user PIN is configured as such in Systems Setup), but making sure that the first 4 digits are unique for each user. You can also re-generate a unique PIN automatically by clicking the auto (other) PIN Generator button.

- You also have an option of importing (attaching) a JPG image of the user’s photo (and detaching it, if you do not like it). The recommended JPG image resolution is ~400 x 500 pixels.



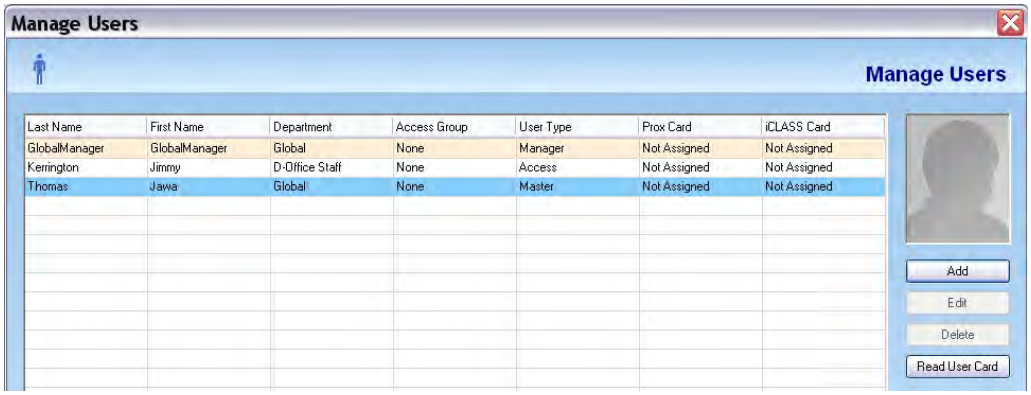
- In the **Keys Used (**ie., Card Type Assigned) field, check both “Prox Card” and “iClass” fields. If you leave the *Keys Used* fields unchecked, then this user can access only the PIN based E-Plex locks such as E3200 and/or E5200.

  Important: If you are going to be enrolling any non standard 27 to 84 bit format Prox tokens (Standard format = 26-bits), you must use the card enroller(s) to enroll cards. The following example shows user creation without any card enrollment.

Note: *By default, there is no expiry for Access and Manager type users. Optionally, you can enter the “Valid From” date to be sometime in the future by few days/weeks etc.*

- Click **Save**. The system saves the changes and displays a confirmation message.

- Click **OK**. The software displays the updated **Manage Users** window.



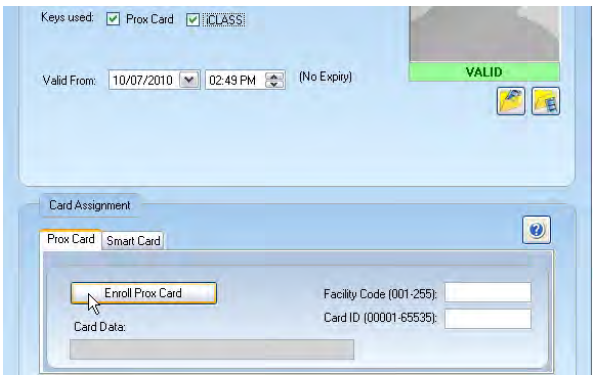
Example showing both Prox and Smartcard Enrollment

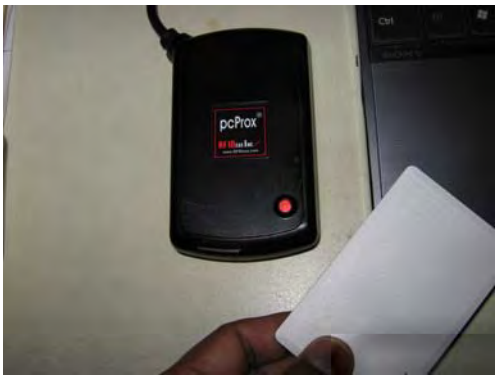
Ensure that the “Keys Used” (Card Type Assigned) fields are checked for both Prox and iCLASS,

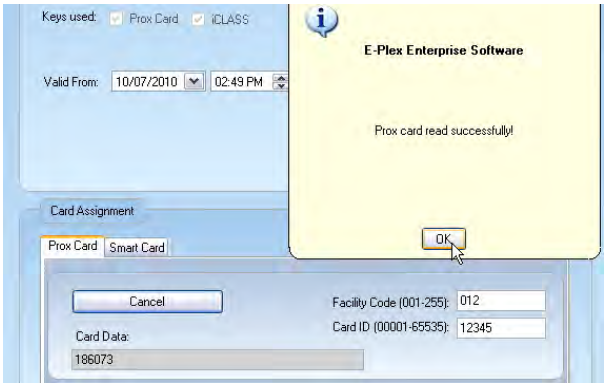
- **Prox Card Assignment** -> There are two different methods available to enroll a user’s Prox token as described below.

  Method 1 - with the Prox Enroller: Click **Enroll Prox Card** and then present this user’s

Prox card momentarily on top of the enroller, wait for the red light to turn green and flash once to indicate that the card ID has been read and stored in the database correctly.



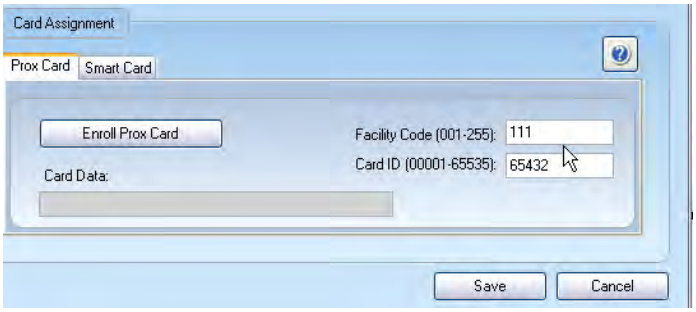




Or,

Method 2 – by entering **Facility Code** (001 – 255) & **Card ID** (00001 – 65535) values directly in these two fields, but only if you know them:

Important: This Method 2 can be used only for the standard 26-bit format HID prox cards and you must know what values to enter.

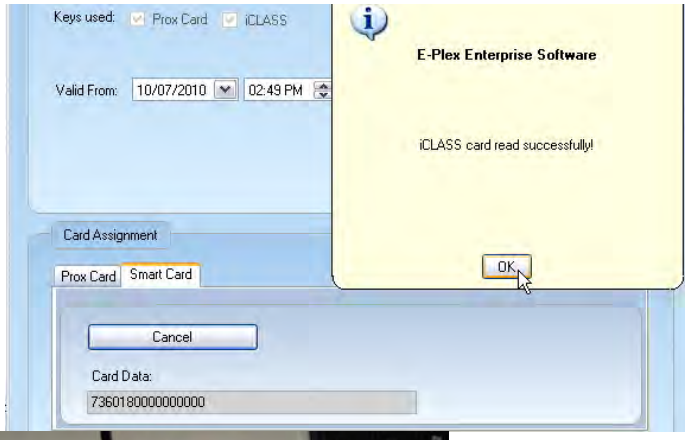


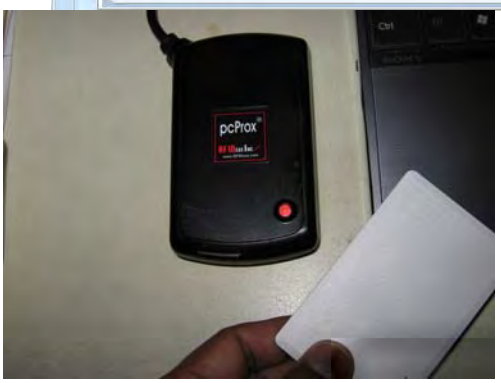
Click **Save** to save this user profile (if you are done and will not be enrolling a smartcard).

- **Smartcard (iClass) Card Assignment** -> For IClass only, again like Prox, there are two different methods available to enroll a user's token, assuming of course that the iClass card ID data conforms to the Standard 26 bit format. Note: For Mifare and DESFire, the card data format does not conform to the Standard 26 bits and so you must use the smartcard enroller.

  In this example, the iClass cards being used are non-standard (27 to 84 bits) format and so we will use the smartcard enroller.

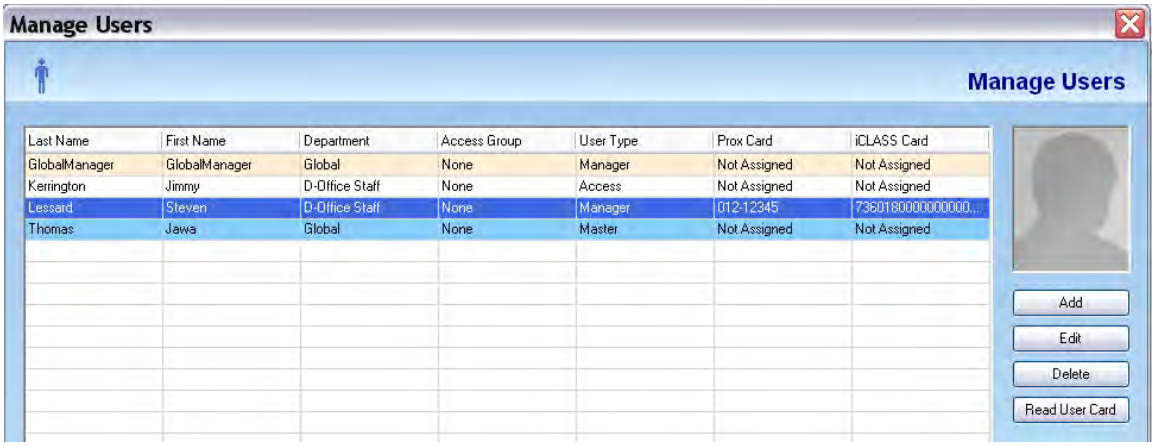
  Click **Enroll iCLASS Card** and then present this user's card momentarily on top of the smartcard enroller, wait for the red light to turn green and flash once, followed by a beep to indicate that the card ID has been read and stored in the database correctly.





Click **OK** and then **Save**. The software returns to the **Manage Users** window with this user's profile updated.

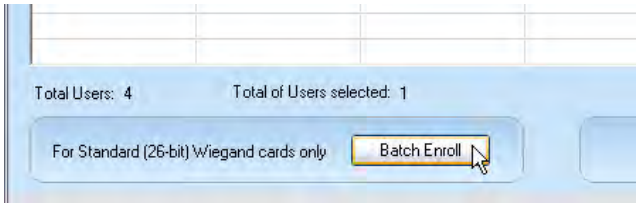
Note: *The newly created user is now shown as created in the system database with both card types assigned to this user.*



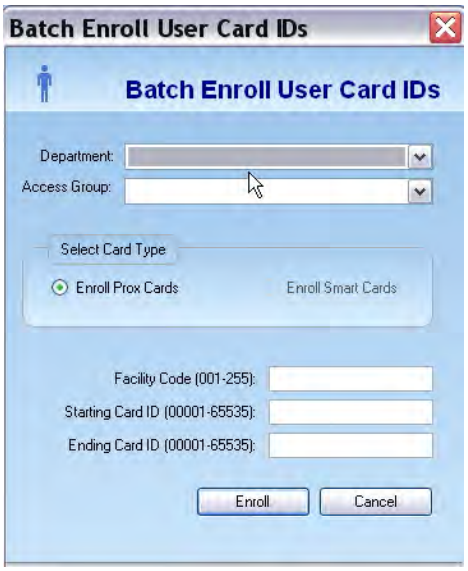
Batch Enrollment (without an Enroller)

Important: This method can be used only for the Standard 26-bit format HID prox and/or iClass cards only, and you must know what values to enter. In this example we will 'batch" enroll a few Standard format Prox cards.

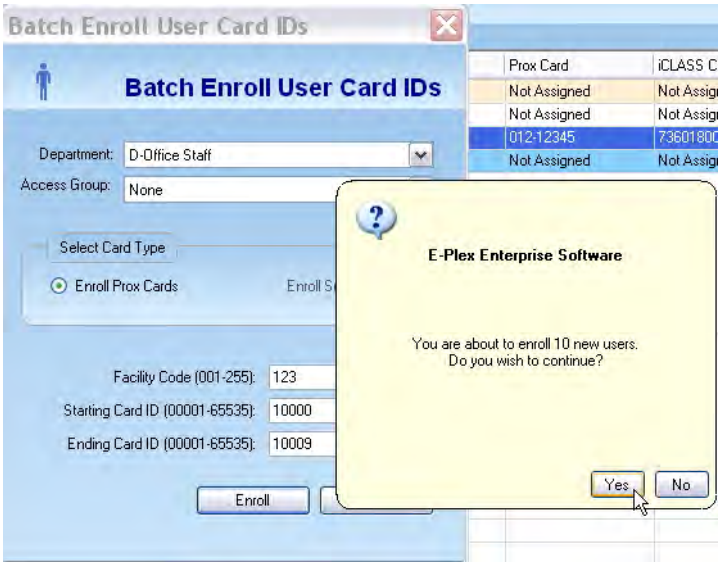
- From the **Manage Users** window, click **Batch Enroll** at the bottom left corner of the screen.



- The following screen is displayed for you to enroll “en masse” tens, or hundreds, or even thousands of Prox credentials, provided all these cards have the same 3-digit Facility code (001 through 255) and that the 5-digit card numbers being enrolled (00001 through 65535) all have sequential card numbers.

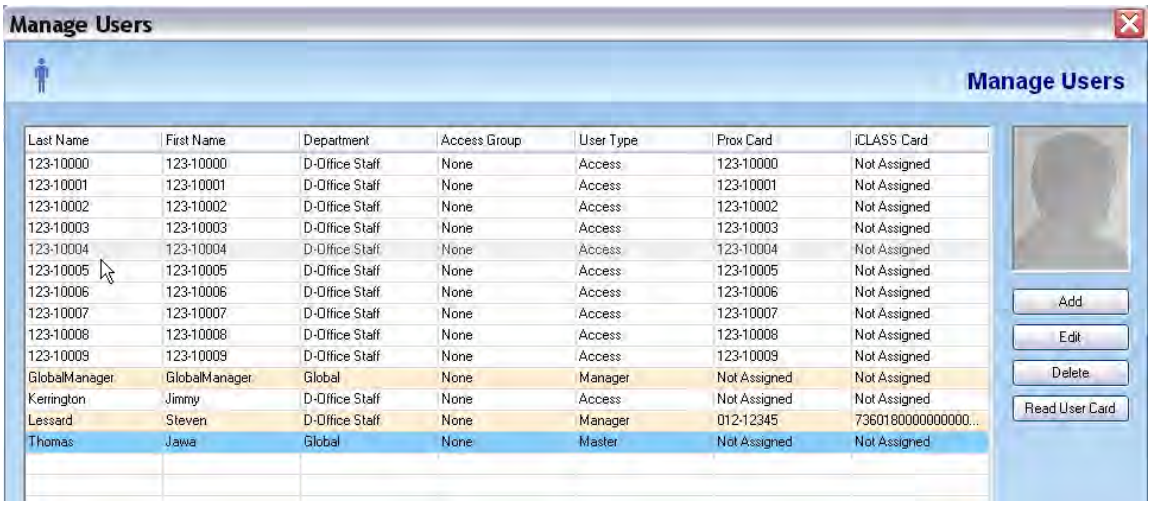


- The following batch enrollment example shows where the Facility code = 123, and the starting Card number is 10000, the ending card number is 10009 to batch enroll 10 cards.
- Click **Enroll** and then **Yes** when asked for confirmation..



- The message “User card IDs enrolled successfully” is displayed and click **OK**.

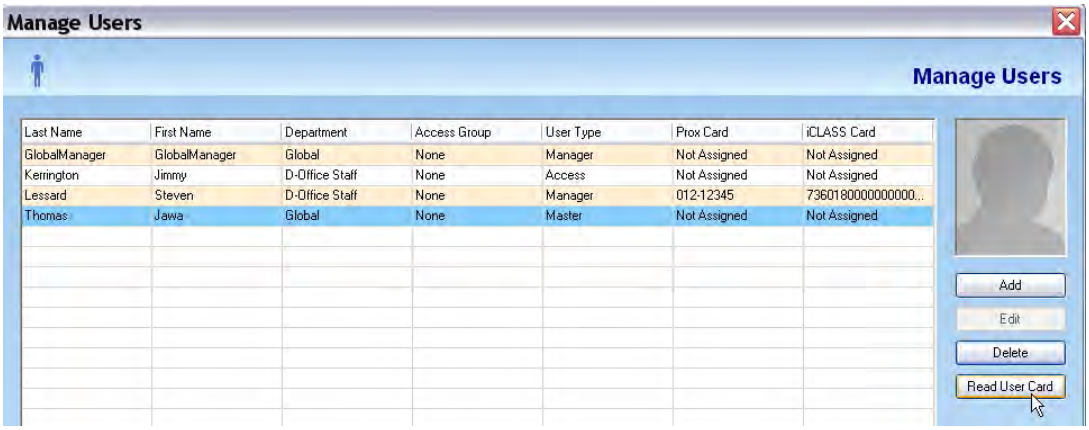
- The screen displays the ten batch enrolled users. Each batch enrolled user's Last name and First name contain the Card ID (123-10000, 123-10001… etc). You can edit their names with real Last and First names, if desired.


Manage Users
Manage Users
Last Name | First Name | Department | Access Group | User Type | Prox Card | iCLASS Card
123-10000 | 123-10000 | D-Office Staff | None | Access | 123-10000 | Not Assigned
123-10001 | 123-10001 | D-Office Staff | None | Access | 123-10001 | Not Assigned
123-10002 | 123-10002 | D-Office Staff | None | Access | 123-10002 | Not Assigned
123-10003 | 123-10003 | D-Office Staff | None | Access | 123-10003 | Not Assigned
123-10004 | 123-10004 | D-Office Staff | None | Access | 123-10004 | Not Assigned
123-10005 | 123-10005 | D-Office Staff | None | Access | 123-10005 | Not Assigned
123-10006 | 123-10006 | D-Office Staff | None | Access | 123-10006 | Not Assigned
123-10007 | 123-10007 | D-Office Staff | None | Access | 123-10007 | Not Assigned
123-10008 | 123-10008 | D-Office Staff | None | Access | 123-10008 | Not Assigned
123-10009 | 123-10009 | D-Office Staff | None | Access | 123-10009 | Not Assigned
GlobalManager | GlobalManager | Global | None | Manager | Not Assigned | Not Assigned
Kerrington | Jimmy | D-Office Staff | None | Access | Not Assigned | Not Assigned
Lessard | Steven | D-Office Staff | None | Manager | 012-12345 | 7360180000000000...
Thomas | Jawa | Global | None | Master | Not Assigned | Not Assigned
Add
Edit
Delete
Read User Card

- Click **Close**.

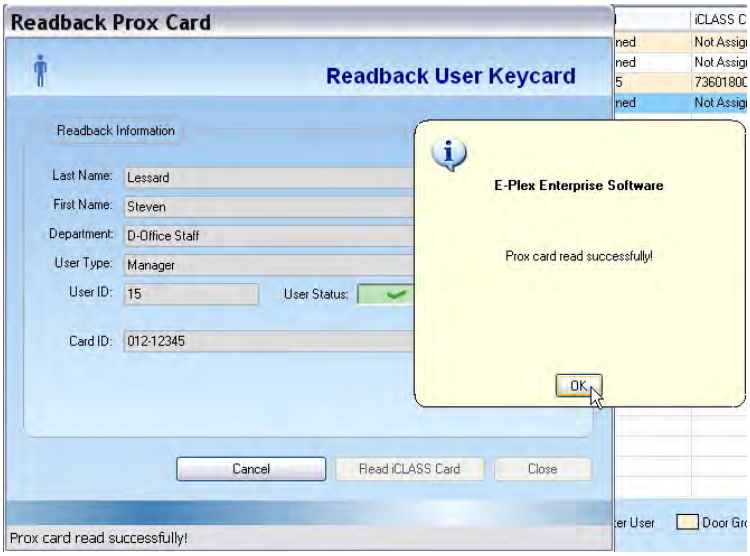
Reading a User's Card

- With an enroller, you can also read the complete Card number (Facility code + Card ID) of a "lost and found" card – Prox or Smartcard by using the applicable enroller. If the card is already enrolled in the system, it will show the complete card number and the user's profile of the card read. If the card is not enrolled in the system, it will only show the card number but not the user's profile info.
- This example shows reading back of a previously enrolled Prox user's card, From the **Manage Users** menu, click **Read User Card**.


Manage Users
Manage Users
Last Name | First Name | Department | Access Group | User Type | Prox Card | iCLASS Card
GlobalManager | GlobalManager | Global | None | Manager | Not Assigned | Not Assigned
Kerrington | Jimmy | D-Office Staff | None | Access | Not Assigned | Not Assigned
Lessard | Steven | D-Office Staff | None | Manager | 012-12345 | 7360180000000000...
Thomas | Jawa | Global | None | Master | Not Assigned | Not Assigned
Add
Edit
Delete
Read User Card

- Read the card in the enroller. If the card read is already enrolled in the system database, the message will display as such including whose card it is; else, it will just display the card ID of the card read.

[Card read user is in the system]:



[Card read user is not in the system]:

- Click **Close** to exit from this sub-menu.

Editing a User

Complete the following steps to edit a user:

- From the **Manage Users** window, click the user name you want to edit.
- Click **Edit**. The software displays the **Edit User** window.

- Edit any required fields (eg., PIN) where changes need to be made, including assigning/un-assigning Prox and/or smartcard or not.
- Click **Save**. The system saves the changes and displays a confirmation message.

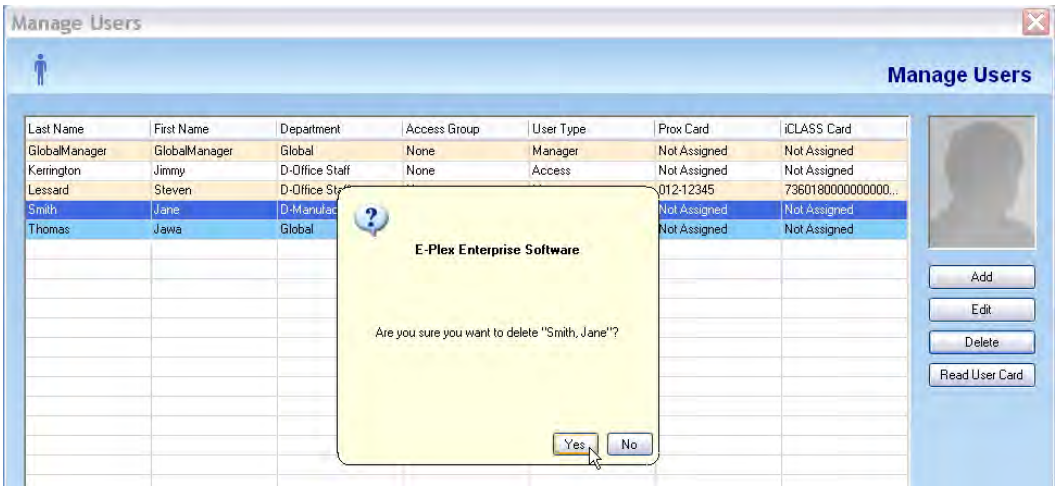
- Click **OK to exit this menu.**

Note: *You should update your locks to reflect modified user profile by transferring the changed info to the M-Unit and uploading/programming the information to the locks. For more information, refer to* ***Portable PC M-Unit*** section *in* **Chapter 5, *Programming and Auditing Locks***.

Deleting a User

Complete the following steps to delete a user:

- From the **Manage Users** window, select the user to delete.
- Click **Delete.** The software prompts you for confirmation.



- Click **Yes**. The software displays the updated **Manage Users** window with the deleted user gone from the list.

Note: *You should update your locks to reflect any unassigned and deleted users by transferring the deleted user(s) info to the M-Unit and uploading/programming this information to the locks. For more information, refer to* ***Portable PC M-Unit*** section *in* **Chapter 5**, ***Programming and Auditing Locks***.

Managing Access Assignment

The “specific” access assignment function allows you to assign each door, one at a time—its access granting schedules to users and their privileges, if any.

You can just use this menu function, instead of the “Manage Access Groups” function to perform the same thing. That is, if you have only a handful of locks/doors (say, fewer than 10) and say, fewer than 50 users to assign to these doors, you can do so in this menu dialog. This is because for a small facility, doing this way may be more convenient than performing the same functions under the “Manage Users/Access Groups” menu dialog.

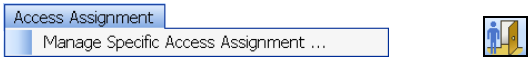
Important: If you had already assigned all your users to all your doors for access under the Manage Users menu via the Access Group option earlier, you can skip this Access Assignment menu. However, if you want to give any of your users one or more of the three Privileges, you can do it only under this Access Assignment menu.

From this menu, you must select a door and assign the users who should have access to this door. Then, for each user you must select and assign one or more available schedules that were already assigned to this door earlier. Finally, for each user you can also optionally assign any one or more of the following three privileges:

- Override holidays/vacations
- Override deadbolt/privacy
- First user passage entry

After this process, the lock configuration data with its users are set up and prepared to be synchronized with the M-Unit for later uploading to the door/lock.

To manage door access assignment, select **Manage Specific Access Assignment** from the **Access Assignment** menu, or click the **Manage Specific Access Assignment** button.



The software displays the **Manage Specific Door User Access** window.

From this window, you can manage door access assignment, including the following:

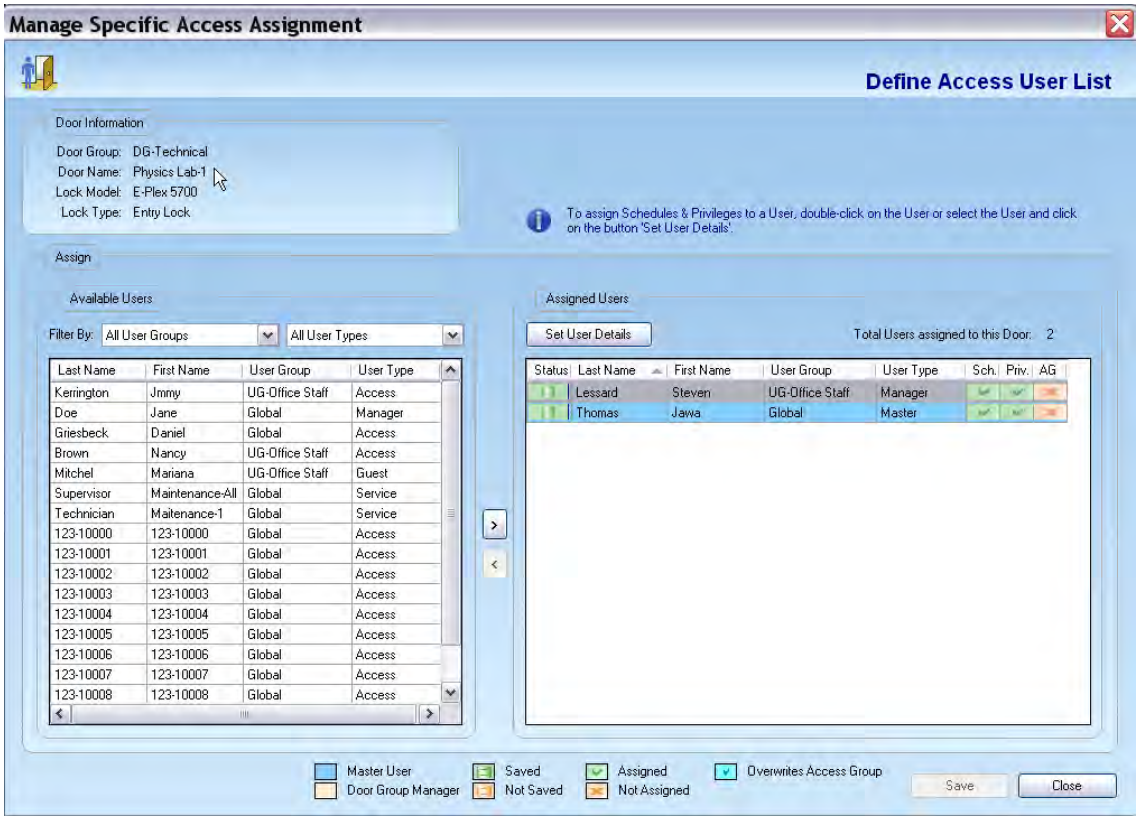
- Assigning access schedules to the door
- Assigning access schedules to each user
- Optionally assigning privileges to each selected user.

Assigning Users to Lock with Privileges

Complete the following steps to manage door access assignment:

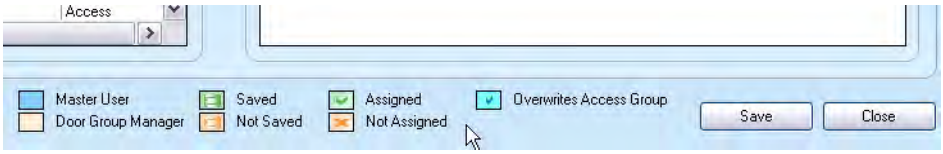
- Select a **Door Group** from the drop-down list.
- Select a **Door Name** from the drop-down list.

- Click **Assign Users**. The software displays the **Define Access User List** window.

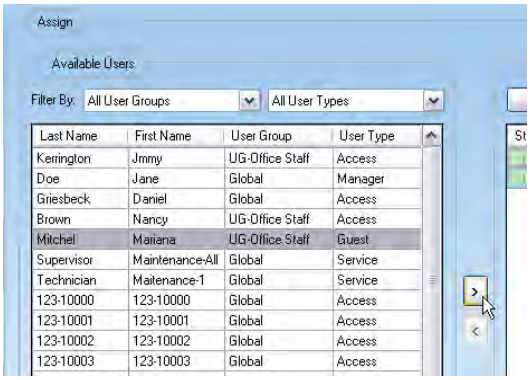


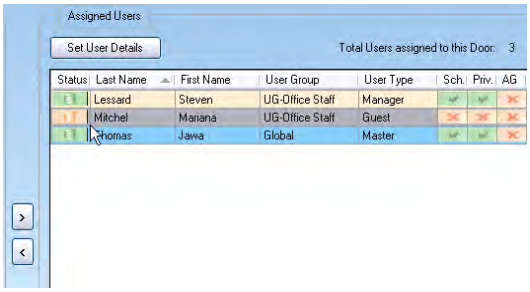
Note: *Once you select the door group and the door name, the software displays the* ***Lock Model*** *and* ***Lock Type*** *for that door.*

- The left side of the screen shows the **Assign** (users to doors) area. Select your users from the **All Departments** and **All User Types** drop-down lists – either all of them or only the "filtered" users as you desire.
- Each icon/pictogram at the bottom of the screen dialog explains what each one means.

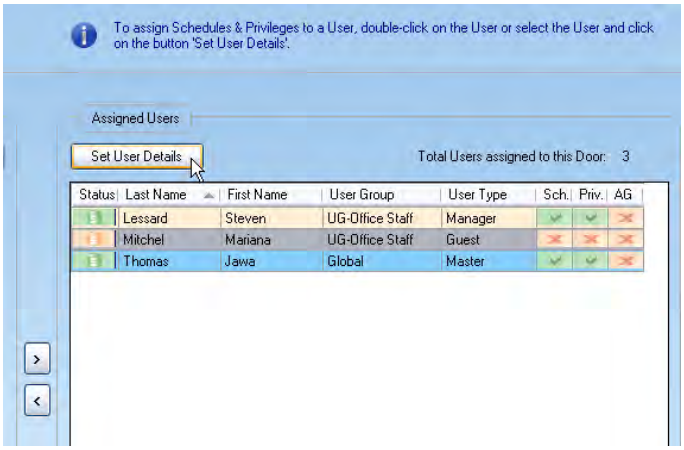


- Click the appropriate user name in the list to select and highlight it.
- Click the **right arrow** ▸ to move the selected user from the database to the door. The moved user is now shown on the right side of the screen under **Assigned Users**.

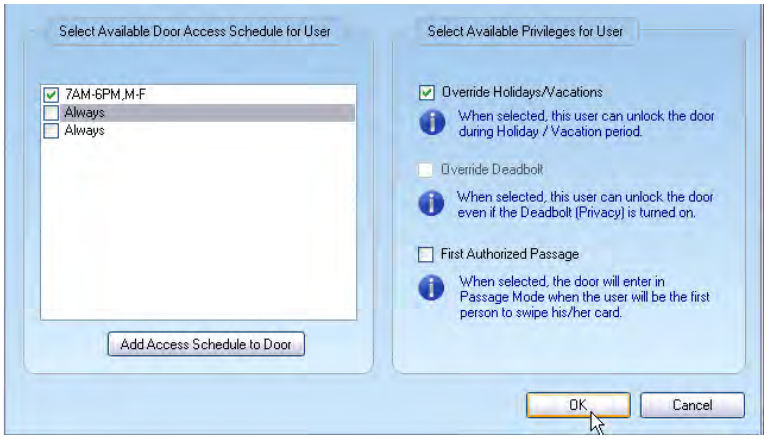




- You must now assign one or more of the available (door) Access Schedules to this user by checking the box(e). Note: The "Always" schedule cannot be combined with any other available schedules for assignment since it overlaps with all other schedules. Optionally, you can also assign one or more of the "privileges" to this user.
- Select/highlight this user and either double click or click **Set User Details.**

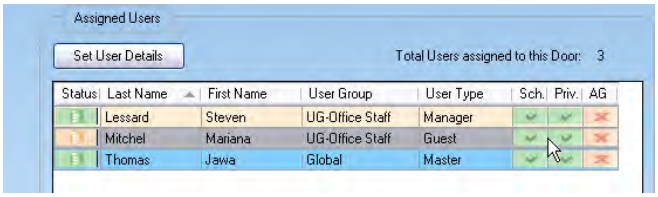

To assign Schedules & Privileges to a User, double-click on the User or select the User and click on the button 'Set User Details'.
Assigned Users
Set User Details
Total Users assigned to this Door: 3
Status
Last Name
First Name
User Group
User Type
Sch.
Priv.
AG
Lessard Steven UG-Office Staff Manager
Mitchel Mariana UG-Office Staff Guest
Thomas Jawa Global Master

- The software displays the **Assign Access Schedules and Privileges to User** window. This screen display is for either an "Access" user or a "Guest" user assignment. Note: The Guest user's maximum expiry is only one year.
- Check the required Access Schedule(s) on the left pane of the screen and any optional Privilege(s) on the right pane of the screen for this user.

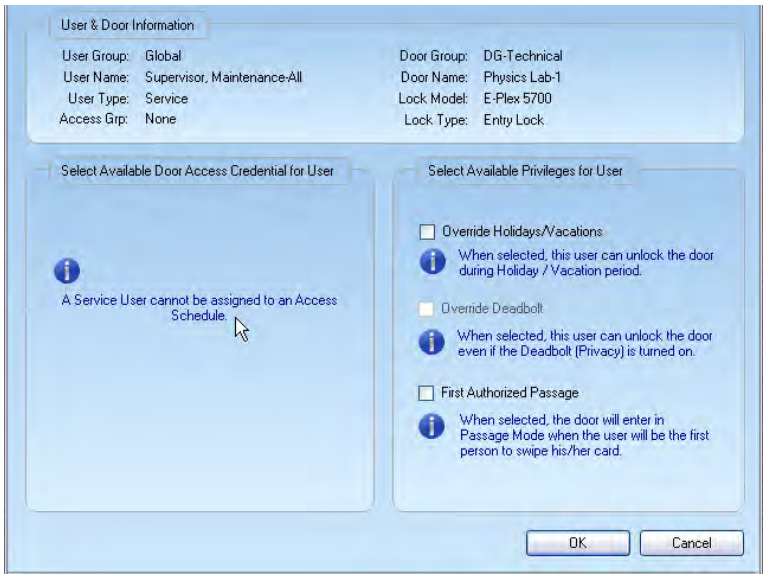

Select Available Door Access Schedule for User
7AM-6PM,M-F
Always
Always
Add Access Schedule to Door
Select Available Privileges for User
Override Holidays/Vacations
When selected, this user can unlock the door during Holiday / Vacation period.
Override Deadbolt
When selected, this user can unlock the door even if the Deadbolt (Privacy) is turned on.
First Authorized Passage
When selected, the door will enter in Passage Mode when the user will be the first person to swipe his/her card.
OK
Cancel

Important: *The "Always" door access schedule cannot be assigned to the door and user(s) along with any other schedules because it overlaps with all other schedules*

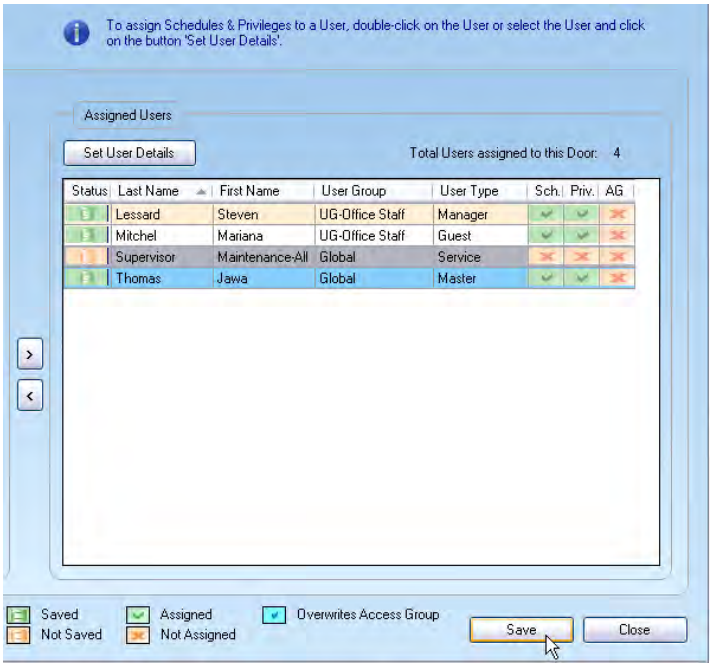
- The following are the three optional privileges:
    - **Override Holidays/Vacations** – The user can unlock the door during holiday/vacation period.
    - **Override Deadbolt** – The user can unlock the door even if the deadbolt (privacy) is thrown from inside (projected) for privacy.
    - **First Authorized Passage** – The door will enter Passage Mode when this user with this privilege will be the first person to open the door with her/his credential.
- Click **OK** when done.
- Note: Optionally, you can also add more Access Schedules and Credential usage within this menu dialog for this door and user(s).
- You will see that now this user's schedule and privilege status boxes are shown as checked in green, meaning that this user has been assigned access to the door.



- The following is an example of the window **Assign Access Schedules and Privileges to User** when a "Service" user is selected for access assignment. The Service user's maximum expiry can be either once (one shot), or from 1 through 96 hours or no expiry. Note: The Service user is not restricted to any access schedules but will always have 24/7 access.


User & Door Information
User Group: Global
User Name: Supervisor, Maintenance-All
User Type: Service
Access Grp: None
Door Group: DG-Technical
Door Name: Physics Lab-1
Lock Model: E-Plex 5700
Lock Type: Entry Lock
Select Available Door Access Credential for User
A Service User cannot be assigned to an Access Schedule.
Select Available Privileges for User
Override Holidays/Vacations
When selected, this user can unlock the door during Holiday / Vacation period.
Override Deadbolt
When selected, this user can unlock the door even if the Deadbolt (Privacy) is turned on.
First Authorized Passage
When selected, the door will enter in Passage Mode when the user will be the first person to swipe his/her card.
OK
Cancel

- Click **OK, Save** and then **Close**.



The software returns to the **Manage Specific Door User Access** window.

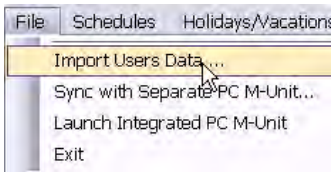
Note: *You should synchronize all updated doors/locks with these newly assigned users with the M-Unit PDA and then program these doors with the M-Unit by uploading the information to the locks. For more information, refer to* ***Portable PC M-Unit*** section *in* **Chapter 5**, ***Programming and Auditing Locks***.

Importing Users

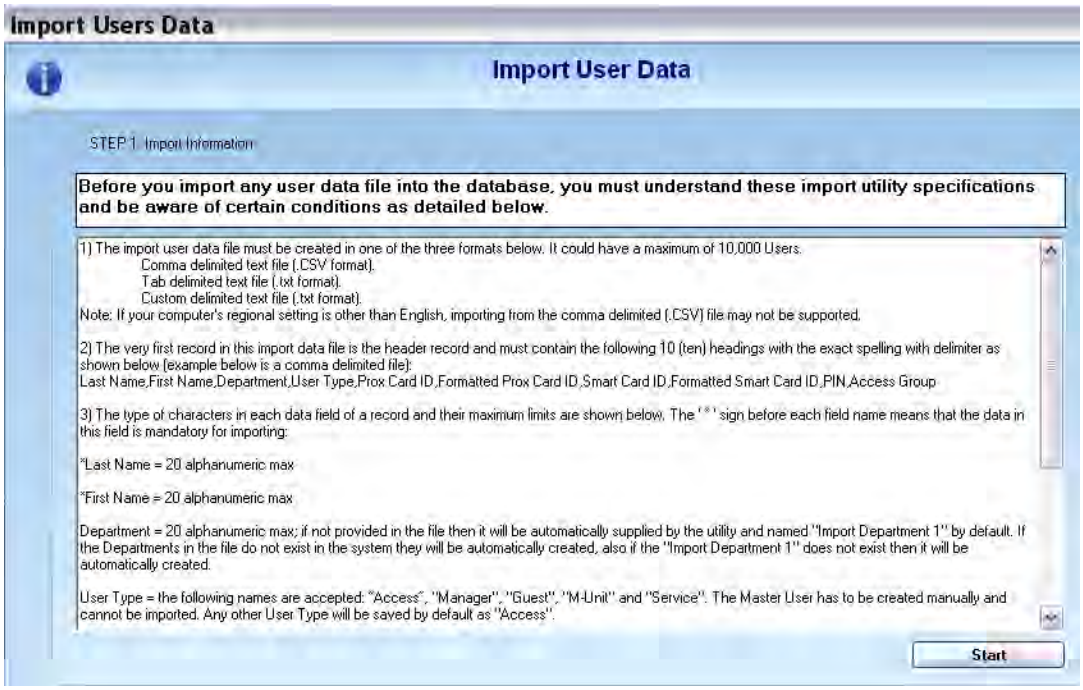
The software allows you to also import up to 20,000 user profile records from an external source. Each user record must contain the Last name and the First name of the user; the PIN and the Prox card ID, if available are optional and so does not have to be included in each user record that needs to be imported into the Enterprise database.

The complete info, import data rules and specifications will be displayed on the screen when you click on ***File*** first, then on ***Import Users Data…*** menu. You will need to simply follow the of the screen prompts when you are ready to import a user profile data file. The ***Format*** of the file to be imported must be either in a TAB delimited (***.txt**) or a "Comma" delimited (***.csv**) text format file, and optionally your own custom format with your specified delimiter character.

- To import a user profile data file, select **File** from the main menu or and then click the **Import Users Data…** button.



- The software displays the **Import User Data** window. Please scroll down and read all required info before starting the import process.


Import Users Data
Import User Data
STEP 1 Import Information
Before you import any user data file into the database, you must understand these import utility specifications and be aware of certain conditions as detailed below.
1) The import user data file must be created in one of the three formats below. It could have a maximum of 10,000 Users.
Comma delimited text file (.CSV format).
Tab delimited text file (.txt format).
Custom delimited text file (.txt format).
Note: If your computer's regional setting is other than English, importing from the comma delimited (.CSV) file may not be supported.
2) The very first record in this import data file is the header record and must contain the following 10 (ten) headings with the exact spelling with delimiter as shown below (example below is a comma delimited file):
Last Name,First Name,Department,User Type,Prox Card ID,Formatted Prox Card ID,Smart Card ID,Formatted Smart Card ID,PIN,Access Group
3) The type of characters in each data field of a record and their maximum limits are shown below. The '*' sign before each field name means that the data in this field is mandatory for importing:
*Last Name = 20 alphanumeric max
*First Name = 20 alphanumeric max
Department = 20 alphanumeric max; if not provided in the file then it will be automatically supplied by the utility and named "Import Department 1" by default. If the Departments in the file do not exist in the system they will be automatically created, also if the "Import Department 1" does not exist then it will be automatically created.
User Type = the following names are accepted: "Access", "Manager", "Guest", "M-Unit" and "Service". The Master User has to be created manually and cannot be imported. Any other User Type will be saved by default as "Access".
Start

- Click **Start** to begin the process of importing users into the Enterprise database from an external .txt or .csv text file.
- The following window opens. Select the file ***Format*** as described earlier of your import file.
- Under ***User PIN***, select either "Automatically Select User PIN" which will automatically generate and assign an 8-digit PIN to each imported user, or select "Import PIN" which will import the end user supplied PIN number for each user from the import file.

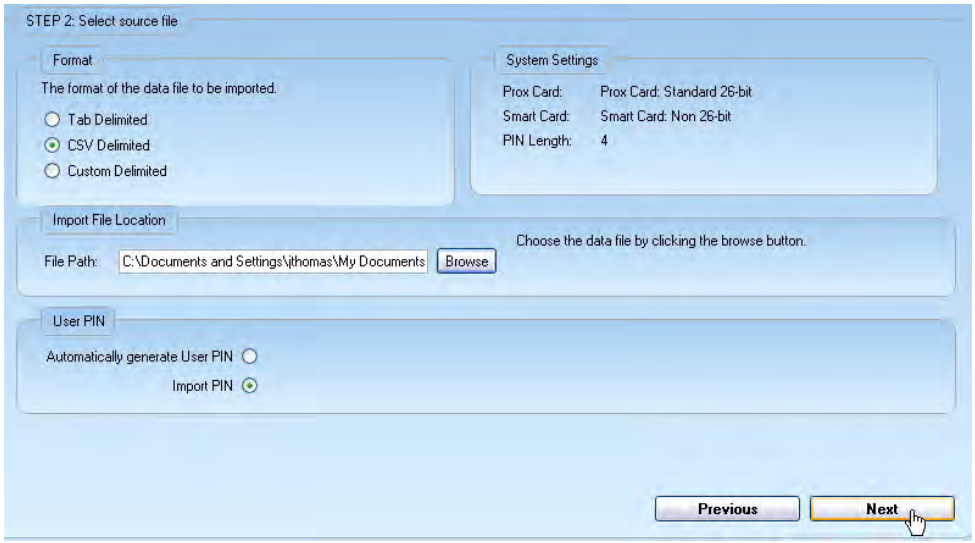
Note: The length of the imported users' PINs must be of the same length (eg. = 4) as what is already configured in the software database under *System Settings*.

- Click **Browse** to locate your input import file from which the users' info will be imported.

  Important: The very first line/row of the import file should contain the following 10 headers, exactly in this following sequence from left to right with the correct spelling of each header name as shown below:

  Last Name First Name Department User Type Prox CardID

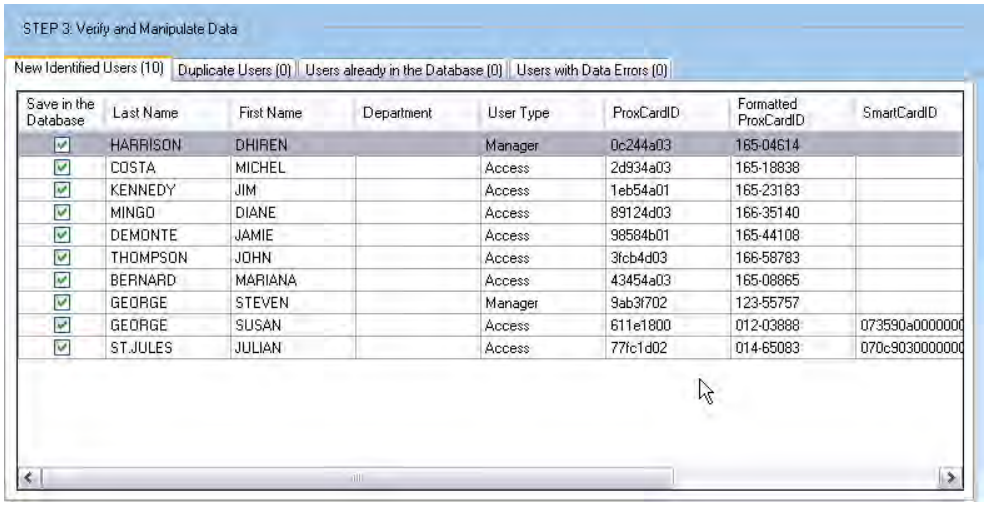
  Formatted ProxCardID SmartCardID Formatted SmartCardID PIN Access Group

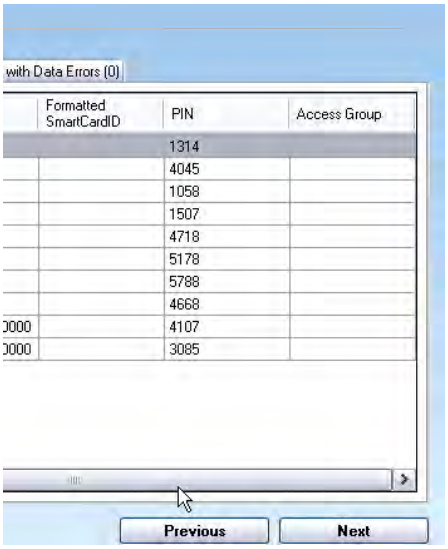


- In the next displayed window, select and click **Open** the actual import file. In this example, the import file contains 10 user records, with not all fields containing data.

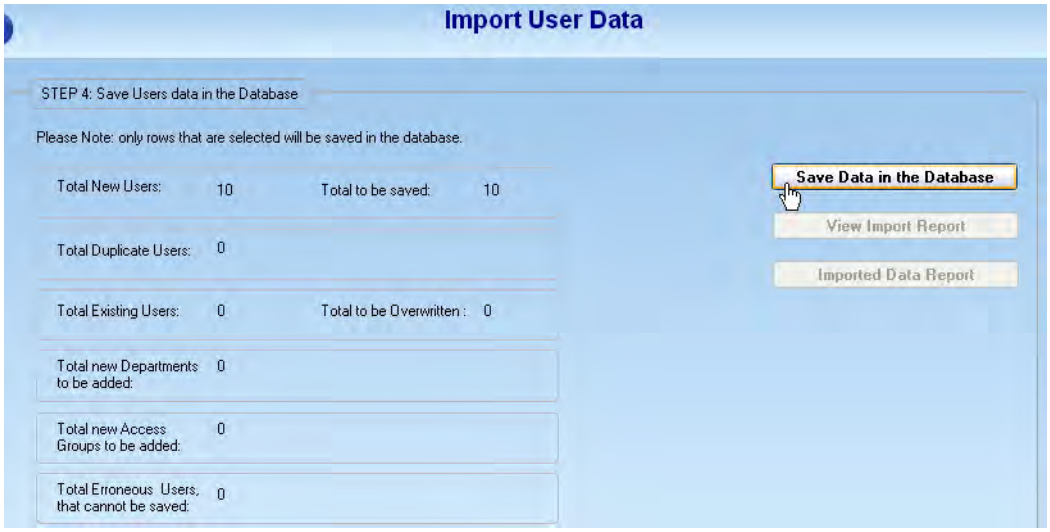
  Important: As a minimum, the import file must contain data in the first two fields -> *Last Name* and *First name*. Additionally, the *PIN* field will be always populated with 8-digit PINs for each imported user, if the "Automatically provide User PIN" option was selected.

- Click **Next** to start importing the users' info from this file. The next window shows all 10 fields of the imported users' records. You can also navigate horizontally through various tab headers on top to view the status of each header.

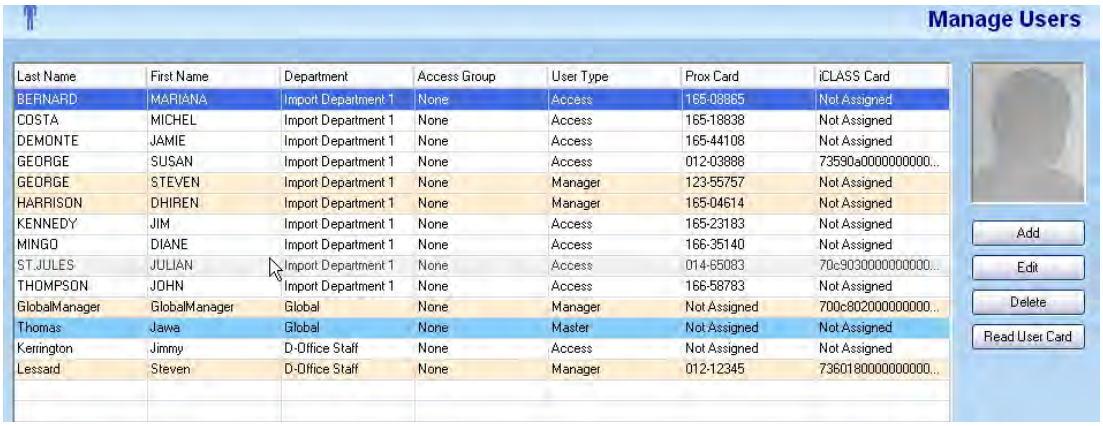




- Click **Next** and the next window displays a complete status of all user records imported under various headers including error messages, if any.
- Verify to ensure that there are no errors and then click **Save data in the Database** to save the imported user info in the database.


Import User Data
STEP 4: Save Users data in the Database
Please Note: only rows that are selected will be saved in the database.
Total New Users: 10
Total to be saved: 10
Total Duplicate Users: 0
Total Existing Users: 0
Total to be Overwritten : 0
Total new Departments to be added: 0
Total new Access Groups to be added: 0
Total Erroneous Users, that cannot be saved: 0
Save Data in the Database
View Import Report
Imported Data Report

- Click **OK** in "Changes successfully Changed" popup message box and then click **Close** to exit from the import users dialog menu and get back to the main menu.
- From the main menu click **Manage Users** and verify for the presence of these imported users. You will see them under the Department named "*Import Department 1",* if no Department name was provided in the original import input file.

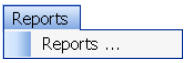

Manage Users
Last Name
First Name
Department
Access Group
User Type
Prox Card
iCLASS Card
BERNARD MARIANA Import Department 1 None Access 165-08865 Not Assigned
COSTA MICHEL Import Department 1 None Access 165-18838 Not Assigned
DEMONTE JAMIE Import Department 1 None Access 165-44108 Not Assigned
GEORGE SUSAN Import Department 1 None Access 012-03888 73590a0000000000...
GEORGE STEVEN Import Department 1 None Manager 123-55757 Not Assigned
HARRISON DHIREN Import Department 1 None Manager 165-04614 Not Assigned
KENNEDY JIM Import Department 1 None Access 165-23183 Not Assigned
MINGO DIANE Import Department 1 None Access 166-35140 Not Assigned
ST.JULES JULIAN Import Department 1 None Access 014-65083 70c9030000000000...
THOMPSON JOHN Import Department 1 None Access 166-58783 Not Assigned
GlobalManager GlobalManager Global None Manager Not Assigned 700c802000000000...
Thomas Jawa Global None Master Not Assigned Not Assigned
Kerrington Jimmy D-Office Staff None Access Not Assigned Not Assigned
Lessard Steven D-Office Staff None Manager 012-12345 73601800000000000...
Add
Edit
Delete
Read User Card

Viewing/Printing/Exporting Reports

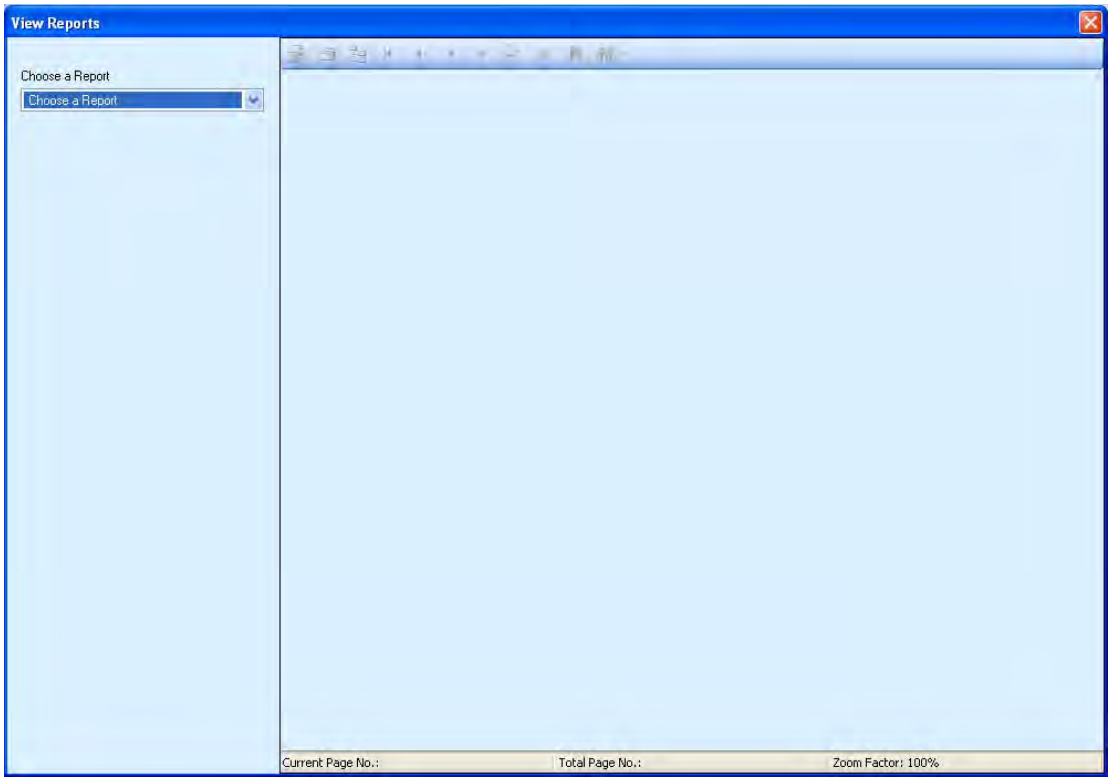
The **Reports** option can be used to view and report on the data that you have defined in the E-Plex Enterprise software and locks. It can also report on the data that you have uploaded to locks defined in the software and also the lock audits downloaded from locks. Once data have been synchronized from the lock to the PC, you can view and report on data from the lock. The software allows you to generate reports from the **Reports** menu.

Note: *Once a report is open for viewing, you will have the option to either print this report or export it in a specific file format type like PDF, Excel, Word etc and save it in any folder of your choice either in your local drive or in any external storage drive.*

To access reports, select **Reports** from the **Reports** menu or click the **Reports** button.



The software displays the **View Reports** window.



From this window, you can select a report to view, print, or export.

Viewing Reports

Complete the following steps to view reports:

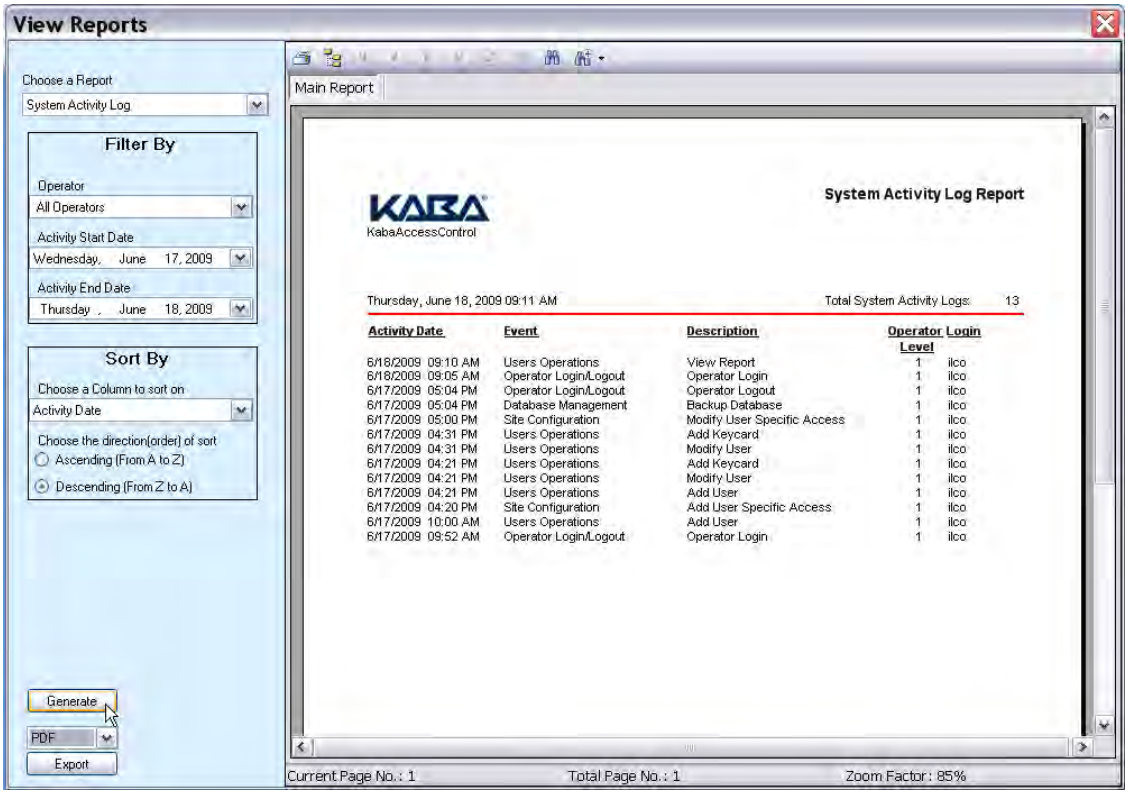
- Select a report from the **Choose a Report** drop-down list in the **View Reports** window.

  Note: *The available Filter By and Sort By options change based on the type of report you choose.*

Select from the **Filter By** options if you want to filter out particular data item(s) to view.

Select from the **Sort By** options to view the data item(s) in a particular sorting order.

Click **Generate**. The software displays the selected report in the **Main Report** pane.


View Reports
Choose a Report
System Activity Log
Filter By
Operator
All Operators
Activity Start Date
Wednesday, June 17, 2009
Activity End Date
Thursday , June 18, 2009
Sort By
Choose a Column to sort on
Activity Date
Choose the direction(order) of sort
Ascending (From A to Z)
Descending (From Z to A)
Generate
PDF
Export
Main Report
KABA
KabaAccessControl
System Activity Log Report
Thursday, June 18, 2009 09:11 AM
Total System Activity Logs: 13
Activity Date | Event | Description | Operator Login Level
6/18/2009 09:10 AM | Users Operations | View Report | 1 | ilco
6/18/2009 09:05 AM | Operator Login/Logout | Operator Login | 1 | ilco
6/17/2009 05:04 PM | Operator Login/Logout | Operator Logout | 1 | ilco
6/17/2009 05:04 PM | Database Management | Backup Database | 1 | ilco
6/17/2009 05:00 PM | Site Configuration | Modify User Specific Access | 1 | ilco
6/17/2009 04:31 PM | Users Operations | Add Keycard | 1 | ilco
6/17/2009 04:31 PM | Users Operations | Modify User | 1 | ilco
6/17/2009 04:21 PM | Users Operations | Add Keycard | 1 | ilco
6/17/2009 04:21 PM | Users Operations | Modify User | 1 | ilco
6/17/2009 04:21 PM | Users Operations | Add User | 1 | ilco
6/17/2009 04:20 PM | Site Configuration | Add User Specific Access | 1 | ilco
6/17/2009 10:00 AM | Users Operations | Add User | 1 | ilco
6/17/2009 09:52 AM | Operator Login/Logout | Operator Login | 1 | ilco
Current Page No.: 1
Total Page No.: 1
Zoom Factor: 85%

If you want to view more Reports, select another report from “Choose a Report” field in the upper left corner of this **View Report** window.

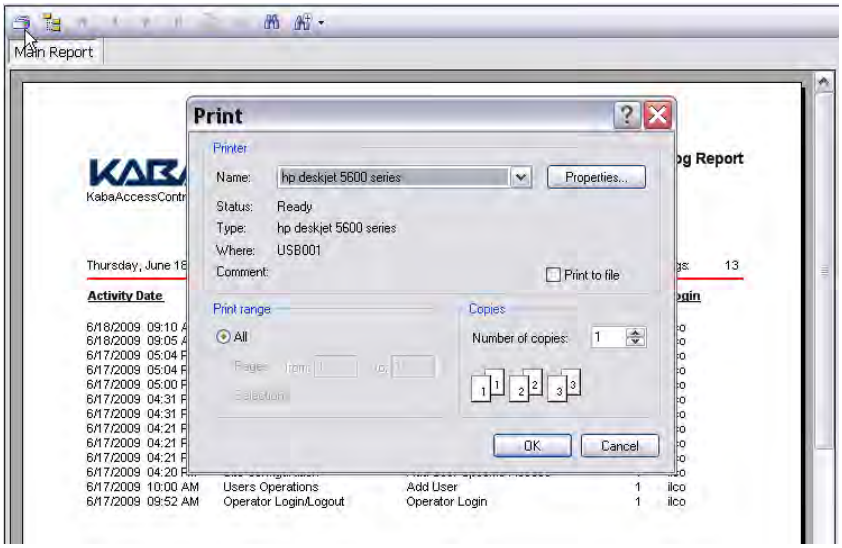
When you are finished viewing the reports, click the red X in the upper right corner to exit the **View Report** window and return to the Main Menu.

Printing Reports

Complete the following steps to print a report by first generating it to view:

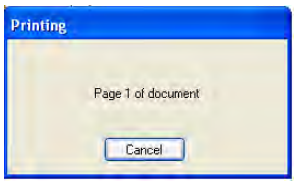
- Click the **Print Report** icon in the **Main Report** pane.

- The system displays the **Print** window.



Select your printer and any additional print options.

Click **OK**. The report is sent to the printer for printing.



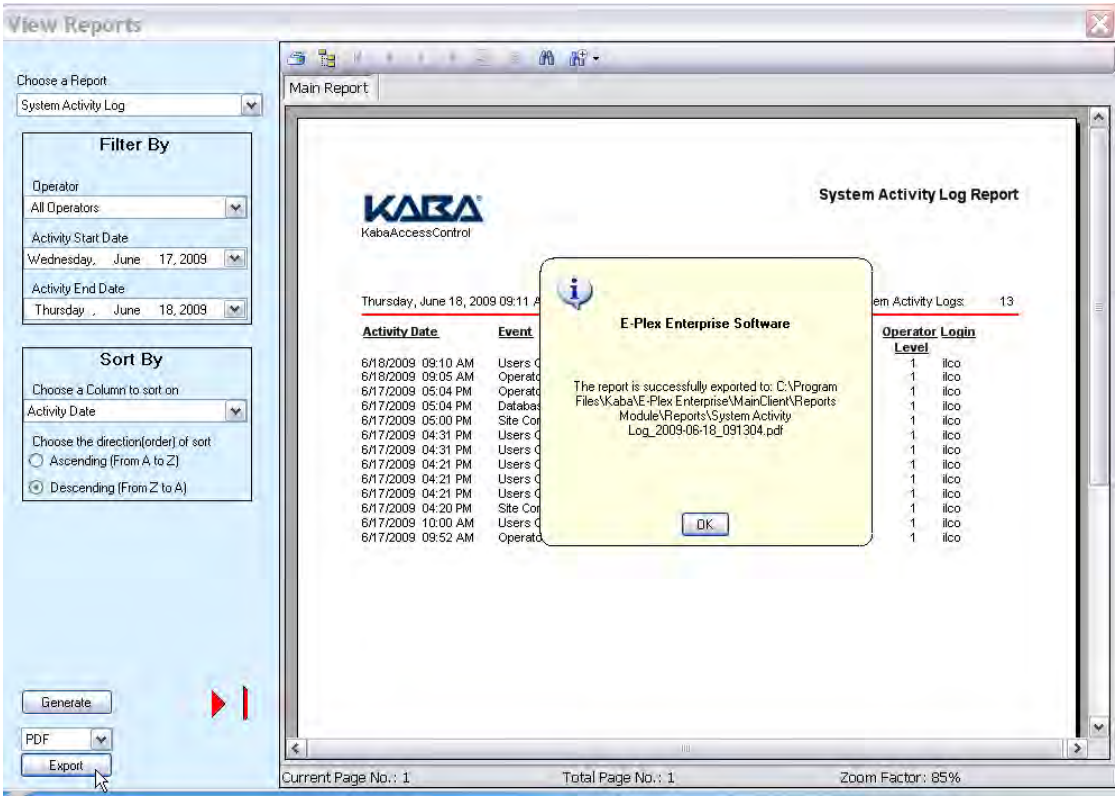
Note: *On some printers, the printed column alignment of a report may not be correct. If this happens, save the file as a text file (the default folder to save reports is* ***C:\Program Files\Kaba\E-Plex Enterprise\MainClient\Reports Module\Reports****). Later, you can retrieve the saved report through Windows Explorer, and then print it to get a properly aligned report.*

Exporting a Report

Complete the following steps to export (and save) a report in a specific file format by first generating it to view:

- From the drop down menu, select the specific file format you want the report file to be exported and saved. The available file formats are **PDF, Word, Excel, Rich Text** and **HTML**.
- Click the **Export Report** icon.
- It will export and save to the specified Reports folder and a “successful” message will be displayed. If no Reports export/save folder path is specified in the ***System Setup/Systems Settings*** menu, the screen will display the **Export Report** window with

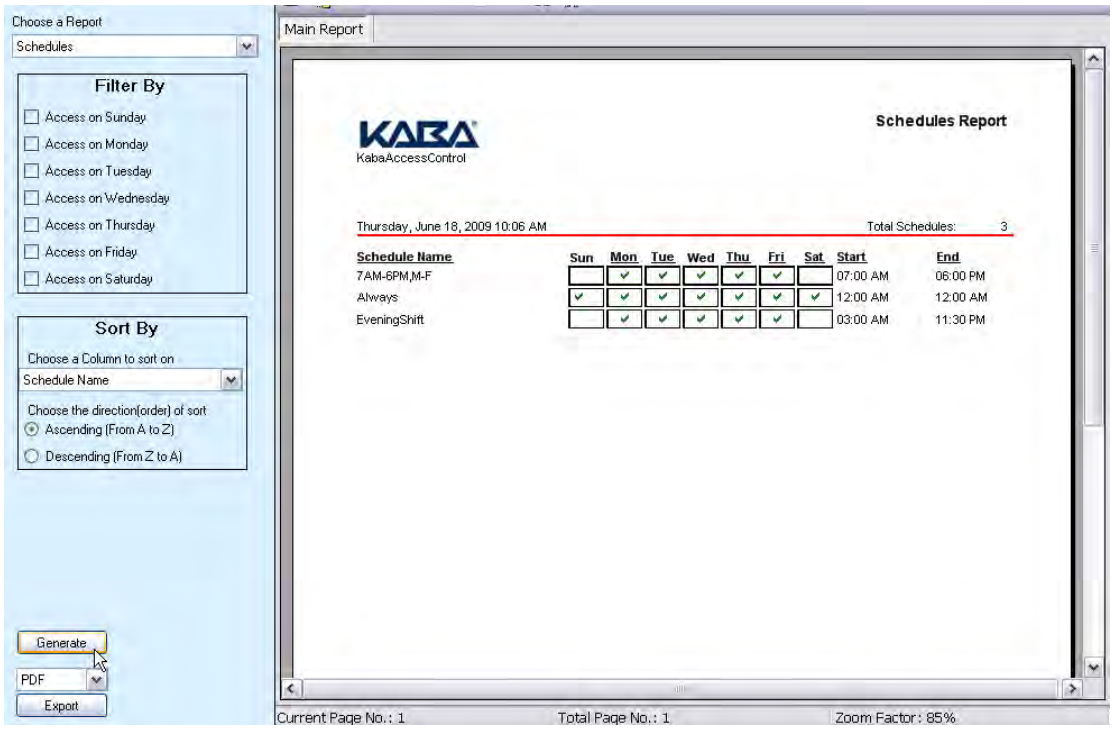
options for you to export and save, either in a folder on your local drive, or any external or network drive.



Click **OK**. The software returns to the Reports window.

Access Schedules Report

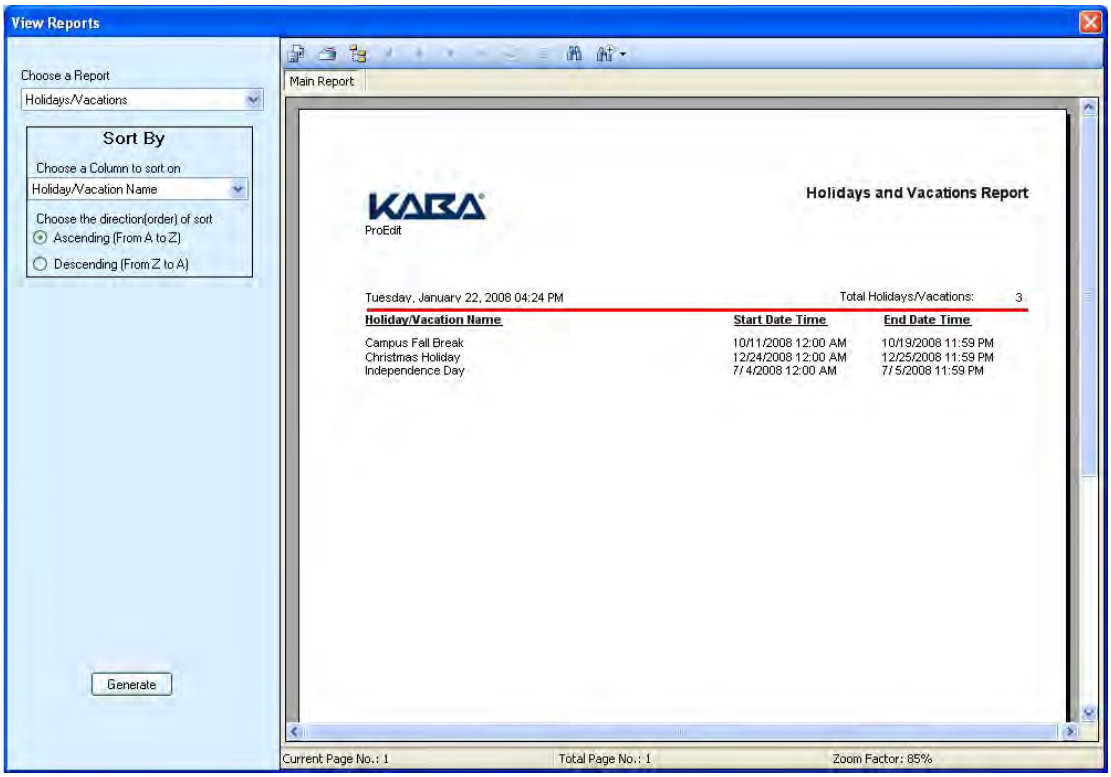
The Access Schedules report displays all schedules that have been defined in the E-Plex Enterprise software.



From this window, you can print and export/save the Access Schedules report.

Holidays/Vacations Report

The Holidays/Vacations report displays all holiday/vacation periods that have been defined in the Enterprise software.

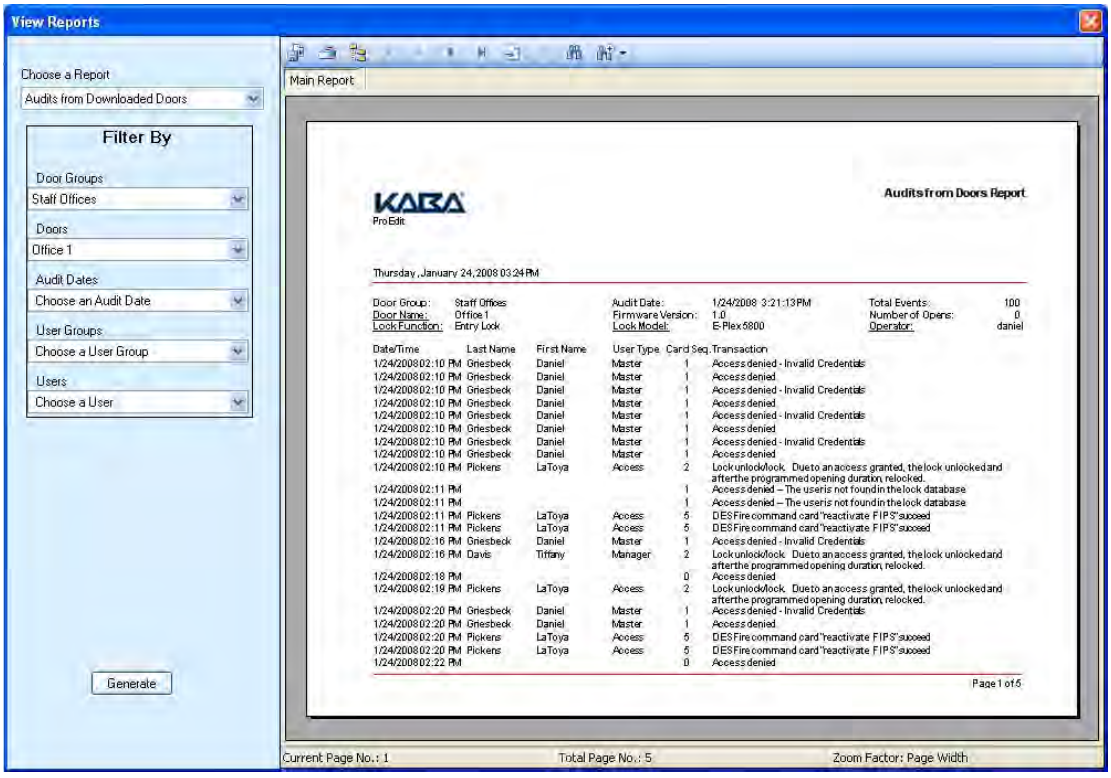


From this window, you can print and export/save the Holidays/Vacations report.

Audits from Downloaded Doors

Each Enterprise software driven E-Plex lock stores up to 30,000 audit events. The audit file is “circular” in that the oldest audited record is overwritten by the most recent one. A hard reset of the lock does not clear the audit trail for security reasons.

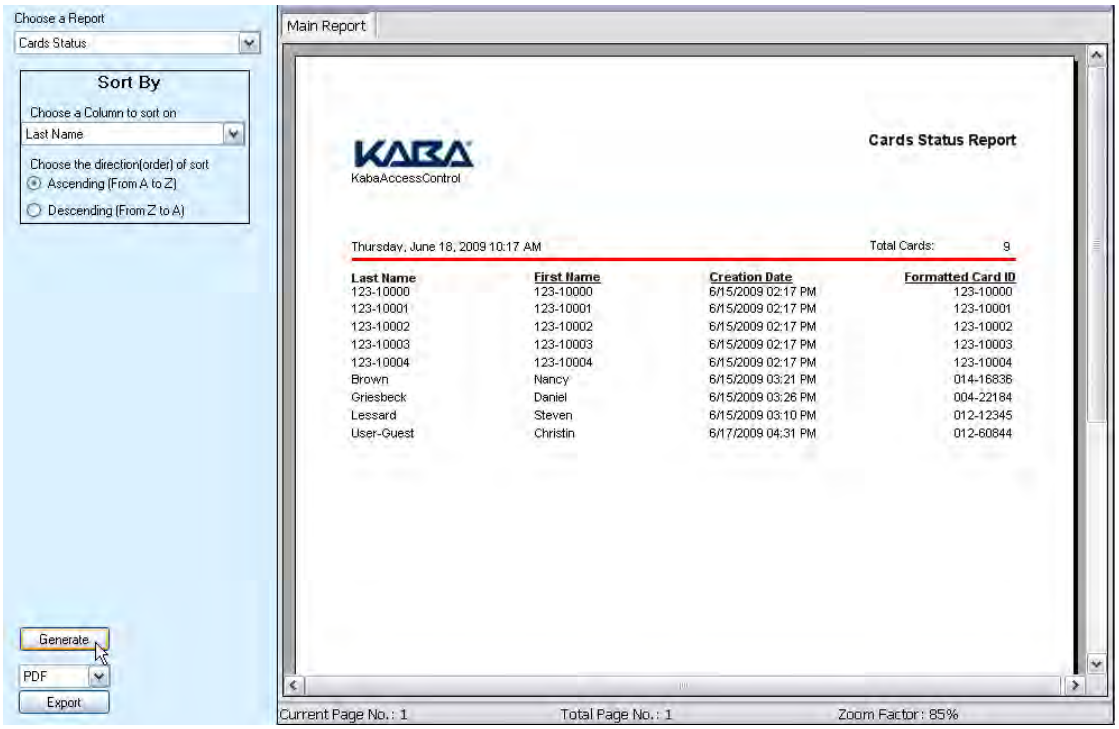
The *Audits from Downloaded Doors* report displays all door audits that have been downloaded from a door or doors to the PC system through the M-Unit. The software displays a list of “download” data files, indicating the name of each door/lock from which a data file has been received.



From this window, you can print and export/save the Audits from Downloaded Doors report.

Cards Status Report

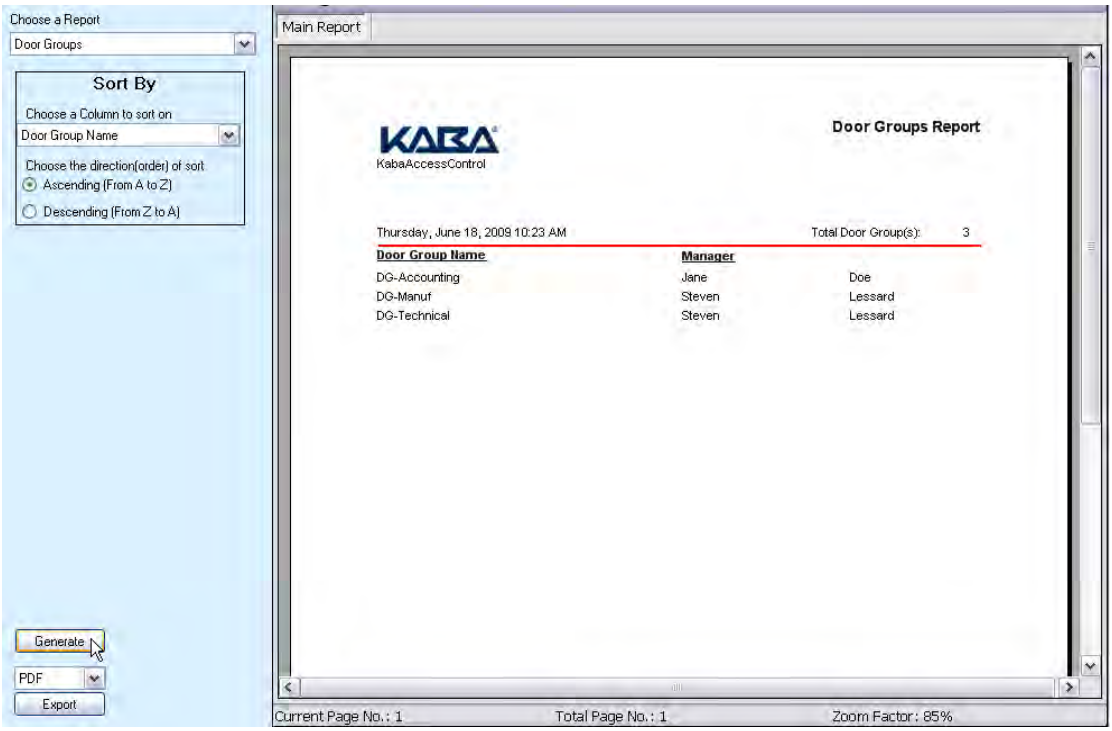
The Cards Status report displays card creation (enrollment) date and card ID info of all card/token users in the system.


Choose a Report
Cards Status
Sort By
Choose a Column to sort on
Last Name
Choose the direction(order) of sort
Ascending (From A to Z)
Descending (From Z to A)
Generate
PDF
Export
Main Report
KABA
KabaAccessControl
Cards Status Report
Thursday, June 18, 2009 10:17 AM
Total Cards: 9
Last Name | First Name | Creation Date | Formatted Card ID
123-10000 | 123-10000 | 6/15/2009 02:17 PM | 123-10000
123-10001 | 123-10001 | 6/15/2009 02:17 PM | 123-10001
123-10002 | 123-10002 | 6/15/2009 02:17 PM | 123-10002
123-10003 | 123-10003 | 6/15/2009 02:17 PM | 123-10003
123-10004 | 123-10004 | 6/15/2009 02:17 PM | 123-10004
Brown | Nancy | 6/15/2009 03:21 PM | 014-16836
Griesbeck | Daniel | 6/15/2009 03:26 PM | 004-22184
Lessard | Steven | 6/15/2009 03:10 PM | 012-12345
User-Guest | Christin | 6/17/2009 04:31 PM | 012-60844
Current Page No.: 1
Total Page No.: 1
Zoom Factor: 85%

From this window, you can print and export/save the Cards Status report.

Door Groups Report

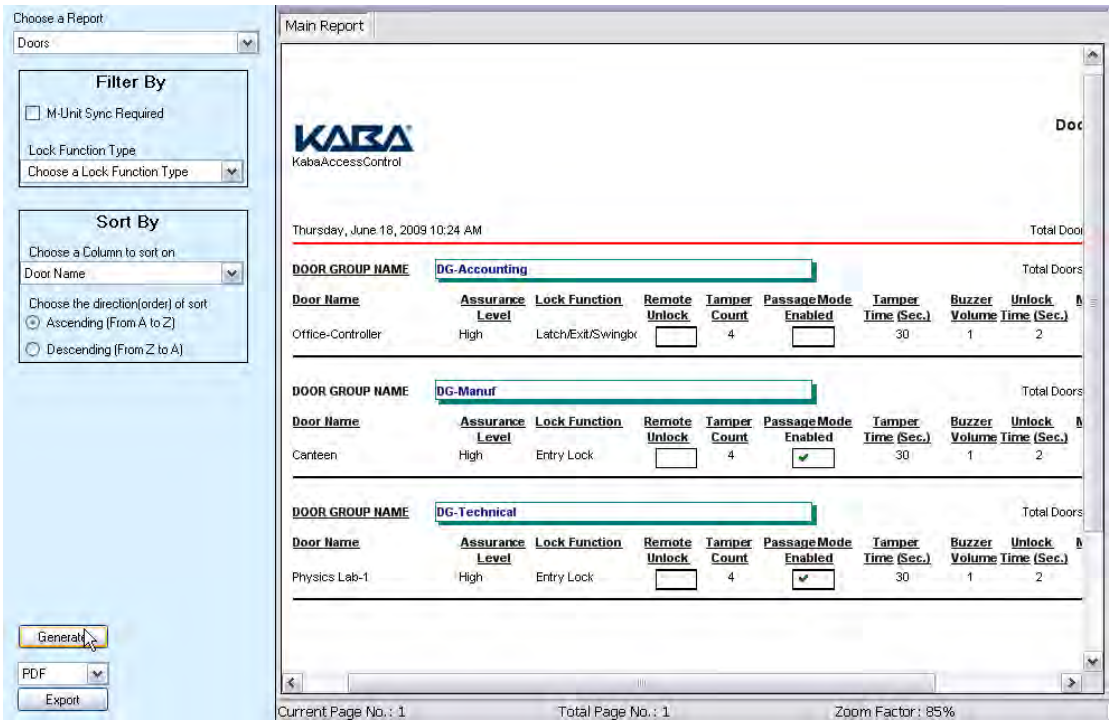
The Door Groups report displays all door groups that have been defined in the Enterprise software.



From this window, you can print and export/save the Door Groups report.

Doors Report

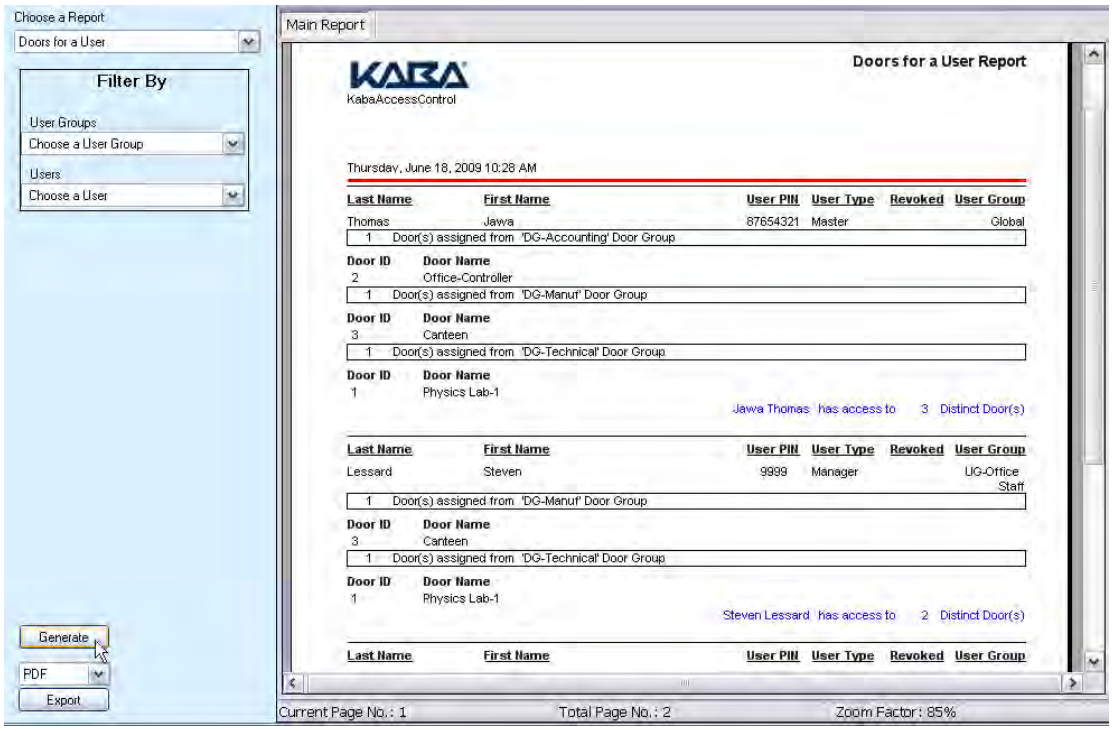
The Doors report displays all doors, up to 100,000 that have been defined in the Enterprise software.


Choose a Report
Doors
Filter By
M-Unit Sync Required
Lock Function Type
Choose a Lock Function Type
Sort By
Choose a Column to sort on
Door Name
Choose the direction(order) of sort
Ascending (From A to Z)
Descending (From Z to A)
Generate
PDF
Export
Main Report
KABA
KabaAccessControl
Thursday, June 18, 2009 10:24 AM
DOOR GROUP NAME DG-Accounting
Door Name | Assurance Level | Lock Function | Remote Unlock | Tamper Count | Passage Mode Enabled | Tamper Time (Sec.) | Buzzer Volume | Unlock Time (Sec.)
Office-Controller | High | Latch/Exit/Swingbo | 4 | 30 | 1 | 2
DOOR GROUP NAME DG-Manuf
Canteen | High | Entry Lock | 4 | 30 | 1 | 2
DOOR GROUP NAME DG-Technical
Physics Lab-1 | High | Entry Lock | 4 | 30 | 1 | 2
Current Page No.: 1
Total Page No.: 1
Zoom Factor: 85%

From this window, you can print and export/save the Doors report.

Doors for a User Report

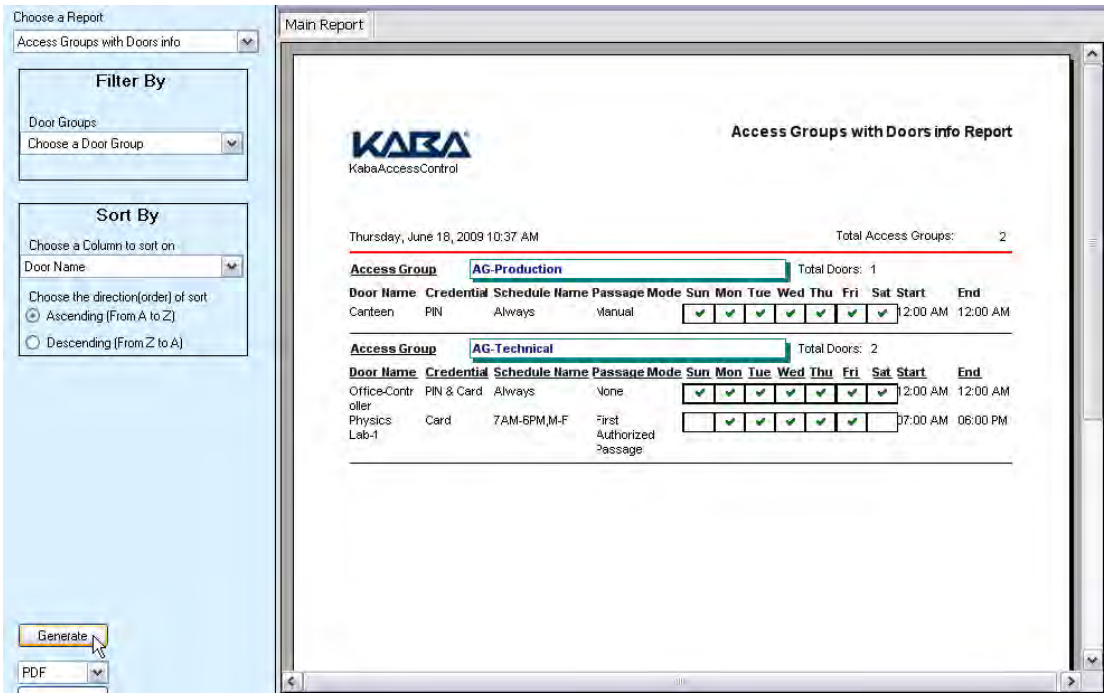
The Doors for a User report allows you to view all doors that a particular user has been assigned to, as well as the access schedules associated with each door, in the Enterprise software.


Choose a Report
Doors for a User
Filter By
User Groups
Choose a User Group
Users
Choose a User
Generate
PDF
Export
Main Report
KABA
KabaAccessControl
Doors for a User Report
Thursday, June 18, 2009 10:28 AM
Last Name First Name User PIN User Type Revoked User Group
Thomas Jawa 87654321 Master Global
1 Door(s) assigned from 'DG-Accounting' Door Group
Door ID Door Name
2 Office-Controller
1 Door(s) assigned from 'DG-Manuf' Door Group
Door ID Door Name
3 Canteen
1 Door(s) assigned from 'DG-Technical' Door Group
Door ID Door Name
1 Physics Lab-1
Jawa Thomas has access to 3 Distinct Door(s)
Last Name First Name User PIN User Type Revoked User Group
Lessard Steven 9999 Manager UG-Office Staff
1 Door(s) assigned from 'DG-Manuf' Door Group
Door ID Door Name
3 Canteen
1 Door(s) assigned from 'DG-Technical' Door Group
Door ID Door Name
1 Physics Lab-1
Steven Lessard has access to 2 Distinct Door(s)
Last Name First Name User PIN User Type Revoked User Group
Current Page No.: 1
Total Page No.: 2
Zoom Factor: 85%

From this window, you can print and export/save the Doors for a User report.

Access Groups with Doors Info Report

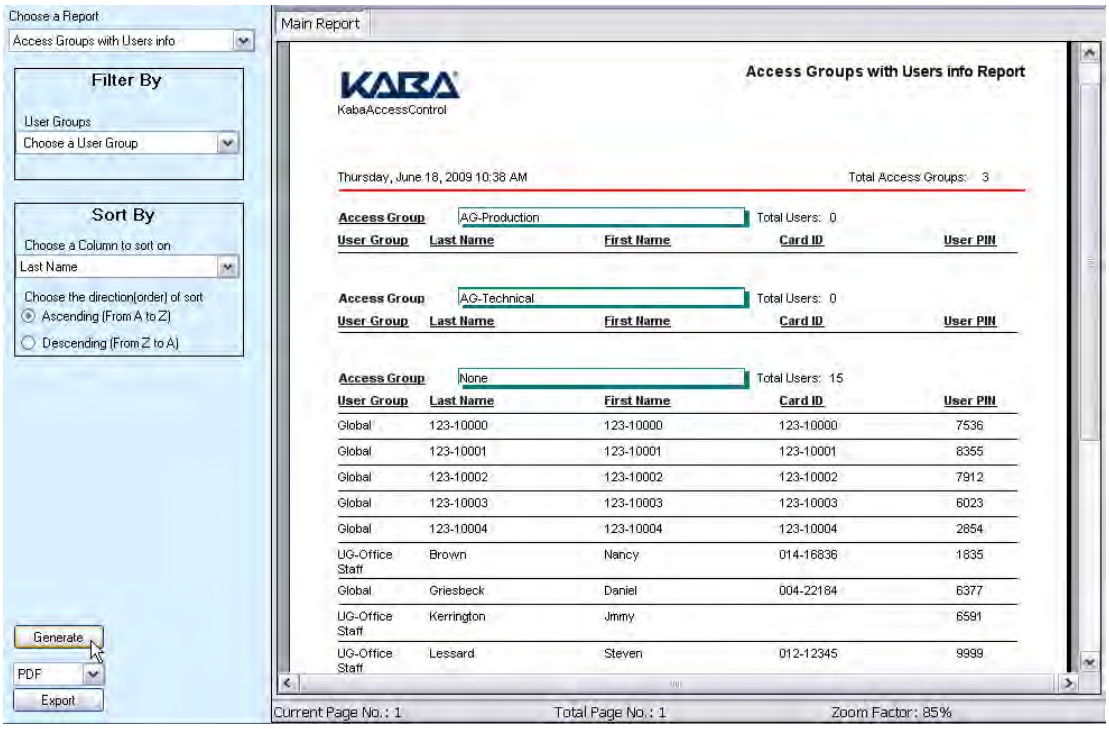
The Access Groups with Doors Info report allows you to view all doors assigned to a particular access group in the Enterprise software.


Choose a Report
Access Groups with Doors info
Filter By
Door Groups
Choose a Door Group
Sort By
Choose a Column to sort on
Door Name
Choose the direction(order) of sort
Ascending (From A to Z)
Descending (From Z to A)
Generate
PDF
Main Report
KABA
KabaAccessControl
Access Groups with Doors info Report
Thursday, June 18, 2009 10:37 AM
Total Access Groups: 2
Access Group AG-Production Total Doors: 1
Door Name Credential Schedule Name Passage Mode Sun Mon Tue Wed Thu Fri Sat Start End
Canteen PIN Always Manual 12:00 AM 12:00 AM
Access Group AG-Technical Total Doors: 2
Door Name Credential Schedule Name Passage Mode Sun Mon Tue Wed Thu Fri Sat Start End
Office-Controller PIN & Card Always None 12:00 AM 12:00 AM
Physics Lab-1 Card 7AM-6PM,M-F First Authorized Passage 07:00 AM 06:00 PM

From this window, you can print and export/save the Access Groups with Doors Info report.

Access Groups with Users Info Report

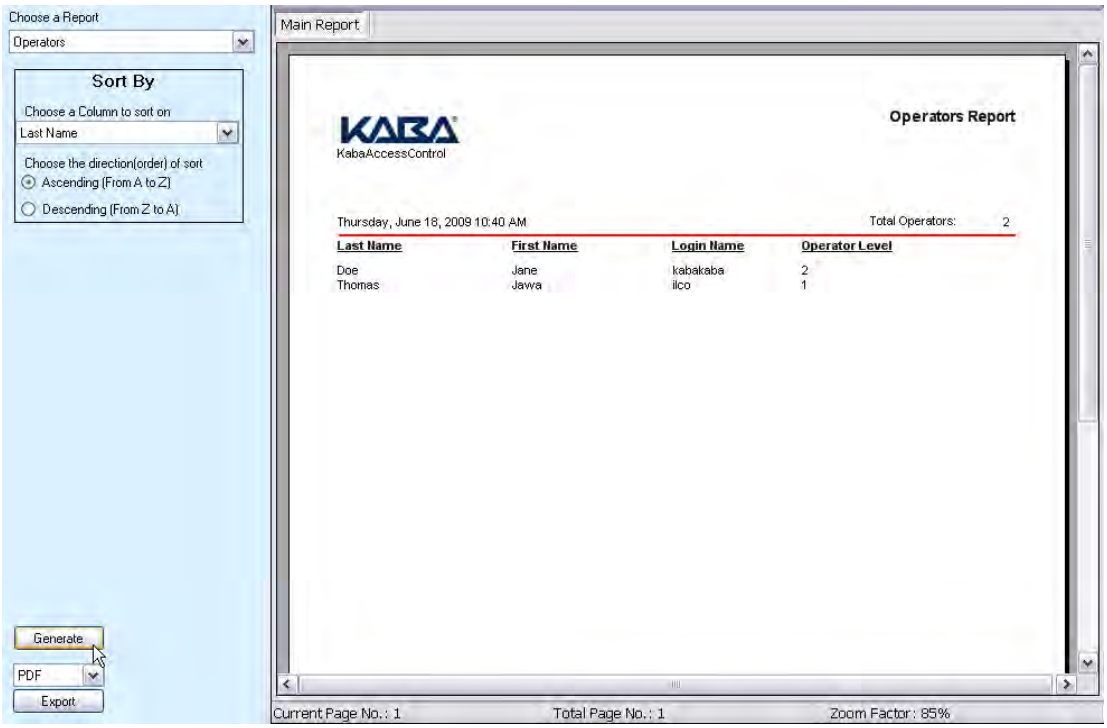
The Access Groups with Users Info report allows you to view all users assigned to a particular access group in the Enterprise software.


Choose a Report
Access Groups with Users info
Filter By
User Groups
Choose a User Group
Sort By
Choose a Column to sort on
Last Name
Choose the direction(order) of sort
Ascending (From A to Z)
Descending (From Z to A)
Generate
PDF
Export
Main Report
KABA
KabaAccessControl
Access Groups with Users info Report
Thursday, June 18, 2009 10:38 AM
Total Access Groups: 3
Access Group AG-Production Total Users: 0
User Group Last Name First Name Card ID User PIN
Access Group AG-Technical Total Users: 0
User Group Last Name First Name Card ID User PIN
Access Group None Total Users: 15
User Group Last Name First Name Card ID User PIN
Global 123-10000 123-10000 123-10000 7536
Global 123-10001 123-10001 123-10001 8355
Global 123-10002 123-10002 123-10002 7912
Global 123-10003 123-10003 123-10003 6023
Global 123-10004 123-10004 123-10004 2854
UG-Office Staff Brown Nancy 014-16836 1835
Global Griesbeck Daniel 004-22184 6377
UG-Office Staff Kerrington Jimmy 6591
UG-Office Staff Lessard Steven 012-12345 9999
Current Page No.: 1
Total Page No.: 1
Zoom Factor: 85%

From this window, you can print and export/save the Access Groups with Users Info report.

Operators Report

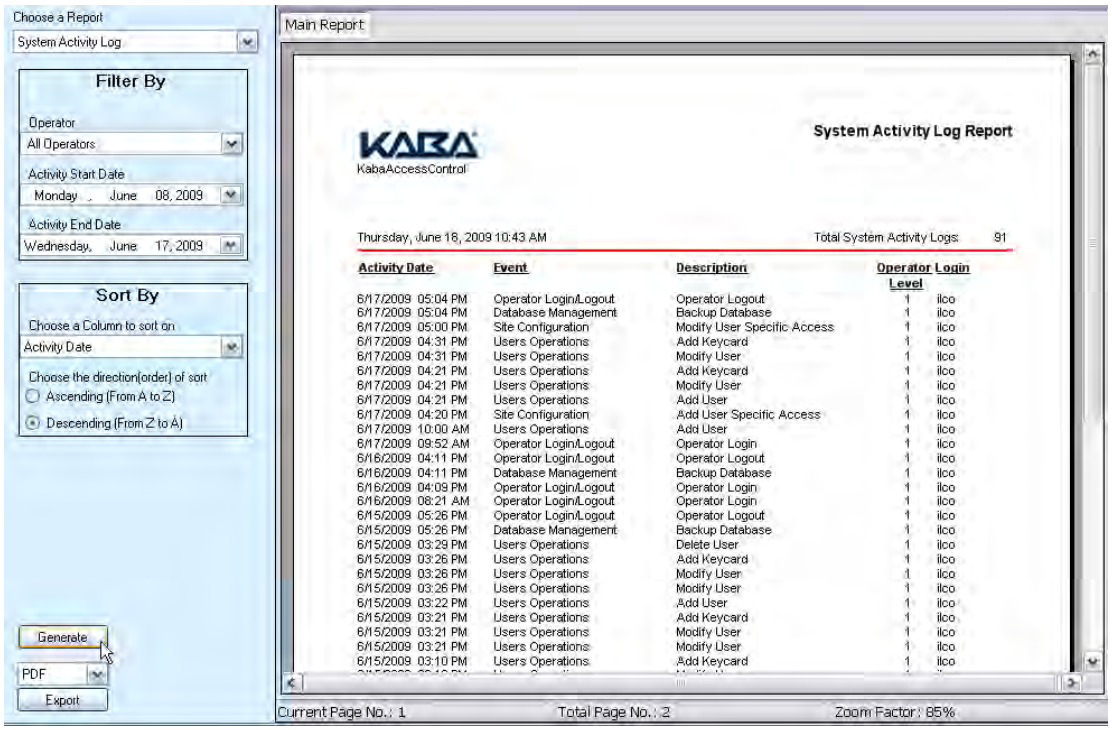
The Operators report displays all three levels of Operators that have been defined in the Enterprise software.



From this window, you can print and export/save the Operators report.

Systems Activity Log Report

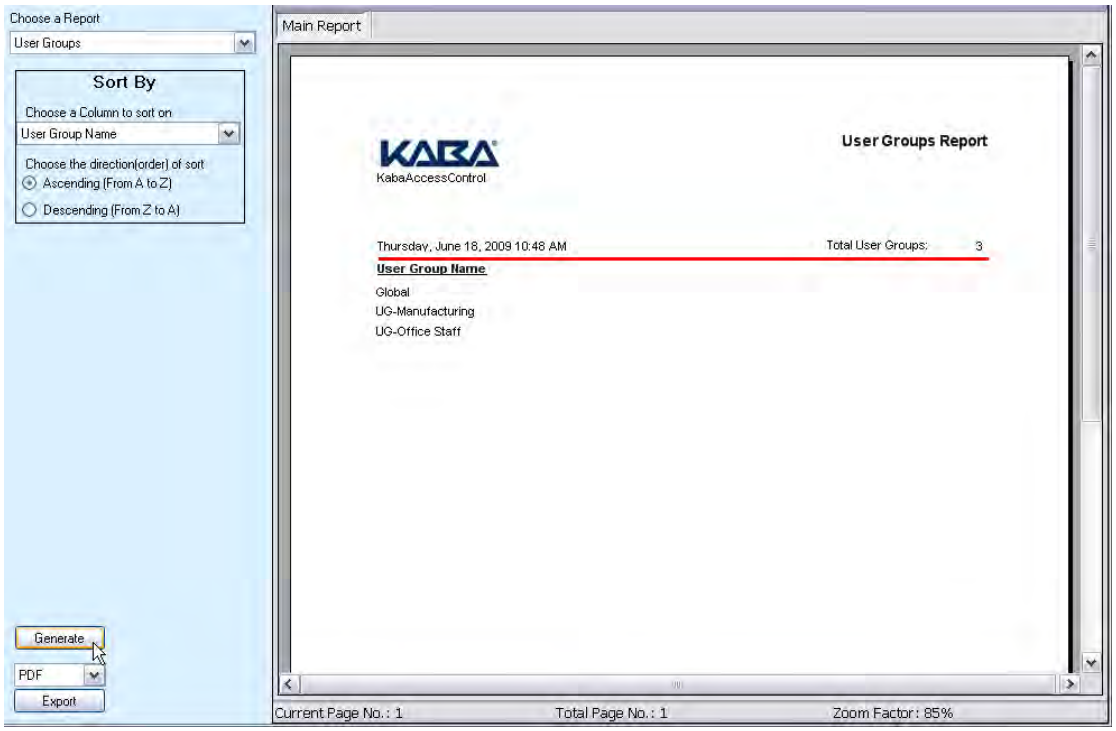
The Systems Activity Log Report displays all Operator activity in the E-Plex Enterprise PC system software.


Choose a Report
System Activity Log
Filter By
Operator
All Operators
Activity Start Date
Monday , June 08, 2009
Activity End Date
Wednesday, June 17, 2009
Sort By
Choose a Column to sort on
Activity Date
Choose the direction(order) of sort
Ascending (From A to Z)
Descending (From Z to A)
Generate
PDF
Export
Main Report
KABA
KabaAccessControl
System Activity Log Report
Thursday, June 18, 2009 10:43 AM
Total System Activity Logs: 91
Activity Date | Event | Description | Operator Login Level
6/17/2009 05:04 PM | Operator Login/Logout | Operator Logout | 1 | ilco
6/17/2009 05:04 PM | Database Management | Backup Database | 1 | ilco
6/17/2009 05:00 PM | Site Configuration | Modify User Specific Access | 1 | ilco
6/17/2009 04:31 PM | Users Operations | Add Keycard | 1 | ilco
6/17/2009 04:31 PM | Users Operations | Modify User | 1 | ilco
6/17/2009 04:21 PM | Users Operations | Add Keycard | 1 | ilco
6/17/2009 04:21 PM | Users Operations | Modify User | 1 | ilco
6/17/2009 04:21 PM | Users Operations | Add User | 1 | ilco
6/17/2009 04:20 PM | Site Configuration | Add User Specific Access | 1 | ilco
6/17/2009 10:00 AM | Users Operations | Add User | 1 | ilco
6/17/2009 09:52 AM | Operator Login/Logout | Operator Login | 1 | ilco
6/16/2009 04:11 PM | Operator Login/Logout | Operator Logout | 1 | ilco
6/16/2009 04:11 PM | Database Management | Backup Database | 1 | ilco
6/16/2009 04:09 PM | Operator Login/Logout | Operator Login | 1 | ilco
6/16/2009 08:21 AM | Operator Login/Logout | Operator Login | 1 | ilco
6/15/2009 05:26 PM | Operator Login/Logout | Operator Logout | 1 | ilco
6/15/2009 05:26 PM | Database Management | Backup Database | 1 | ilco
6/15/2009 03:29 PM | Users Operations | Delete User | 1 | ilco
6/15/2009 03:26 PM | Users Operations | Add Keycard | 1 | ilco
6/15/2009 03:26 PM | Users Operations | Modify User | 1 | ilco
6/15/2009 03:26 PM | Users Operations | Modify User | 1 | ilco
6/15/2009 03:22 PM | Users Operations | Add User | 1 | ilco
6/15/2009 03:21 PM | Users Operations | Add Keycard | 1 | ilco
6/15/2009 03:21 PM | Users Operations | Modify User | 1 | ilco
6/15/2009 03:21 PM | Users Operations | Modify User | 1 | ilco
6/15/2009 03:10 PM | Users Operations | Add Keycard | 1 | ilco
Current Page No.: 1
Total Page No.: 2
Zoom Factor: 85%

From this window, you can print and export/save the Systems Activity Log Report.

Departments Report

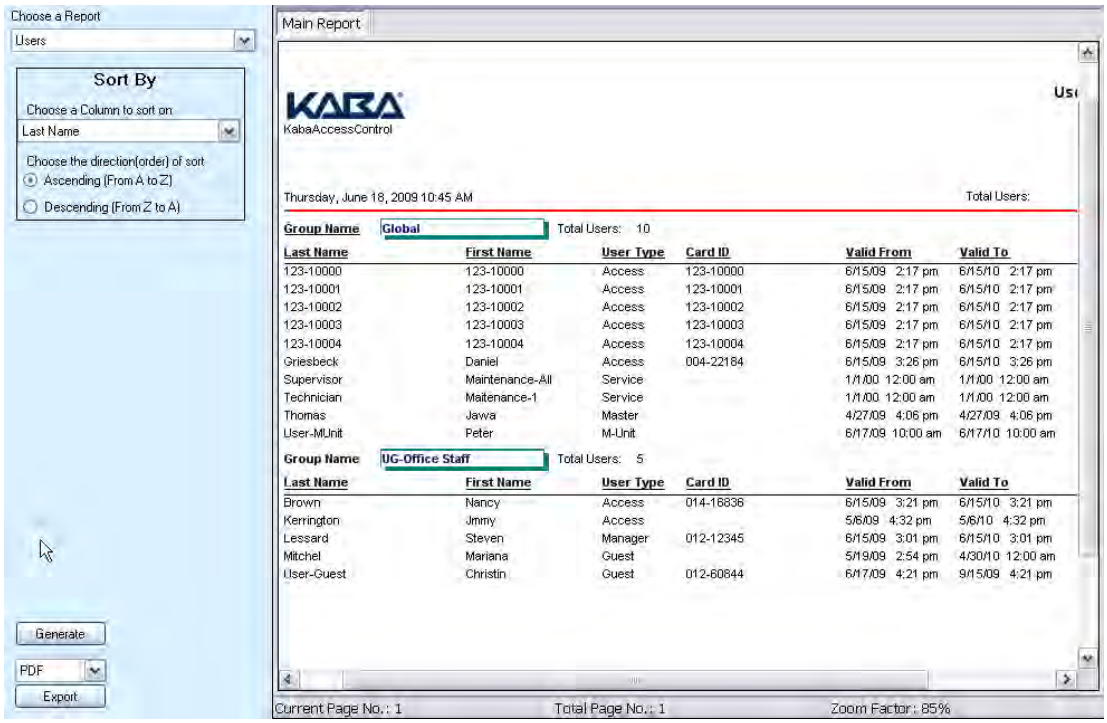
The Departments report displays all Departments defined in the Enterprise software.



From this window, you can print and export/save the Departments report.

Users Report

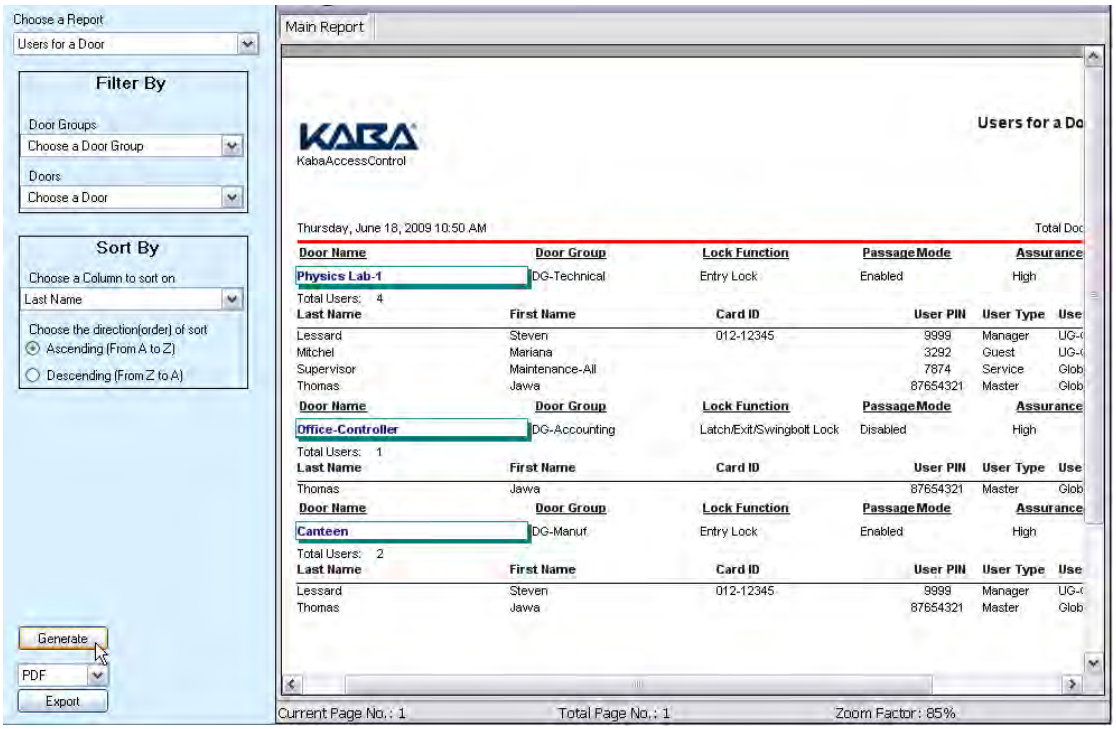
The Users report displays all the users defined in the Enterprise software.


Choose a Report
Users
Sort By
Choose a Column to sort on
Last Name
Choose the direction(order) of sort
Ascending (From A to Z)
Descending (From Z to A)
Generate
PDF
Export
Main Report
KABA
KabaAccessControl
Thursday, June 18, 2009 10:45 AM
Total Users:
Group Name Global Total Users: 10
Last Name First Name User Type Card ID Valid From Valid To
123-10000 123-10000 Access 123-10000 6/15/09 2:17 pm 6/15/10 2:17 pm
123-10001 123-10001 Access 123-10001 6/15/09 2:17 pm 6/15/10 2:17 pm
123-10002 123-10002 Access 123-10002 6/15/09 2:17 pm 6/15/10 2:17 pm
123-10003 123-10003 Access 123-10003 6/15/09 2:17 pm 6/15/10 2:17 pm
123-10004 123-10004 Access 123-10004 6/15/09 2:17 pm 6/15/10 2:17 pm
Griesbeck Daniel Access 004-22184 6/15/09 3:26 pm 6/15/10 3:26 pm
Supervisor Maintenance-All Service 1/1/00 12:00 am 1/1/00 12:00 am
Technician Maitenance-1 Service 1/1/00 12:00 am 1/1/00 12:00 am
Thomas Jawa Master 4/27/09 4:06 pm 4/27/09 4:06 pm
User-MUnit Peter M-Unit 6/17/09 10:00 am 6/17/10 10:00 am
Group Name UG-Office Staff Total Users: 5
Last Name First Name User Type Card ID Valid From Valid To
Brown Nancy Access 014-16836 6/15/09 3:21 pm 6/15/10 3:21 pm
Kerrington Jimmy Access 5/6/09 4:32 pm 5/6/10 4:32 pm
Lessard Steven Manager 012-12345 6/15/09 3:01 pm 6/15/10 3:01 pm
Mitchel Mariana Guest 5/19/09 2:54 pm 4/30/10 12:00 am
User-Guest Christin Guest 012-60844 6/17/09 4:21 pm 9/15/09 4:21 pm
Current Page No.: 1
Total Page No.: 1
Zoom Factor: 85%

From this window, you can print and export/save the Users report.

Users for a Door Report

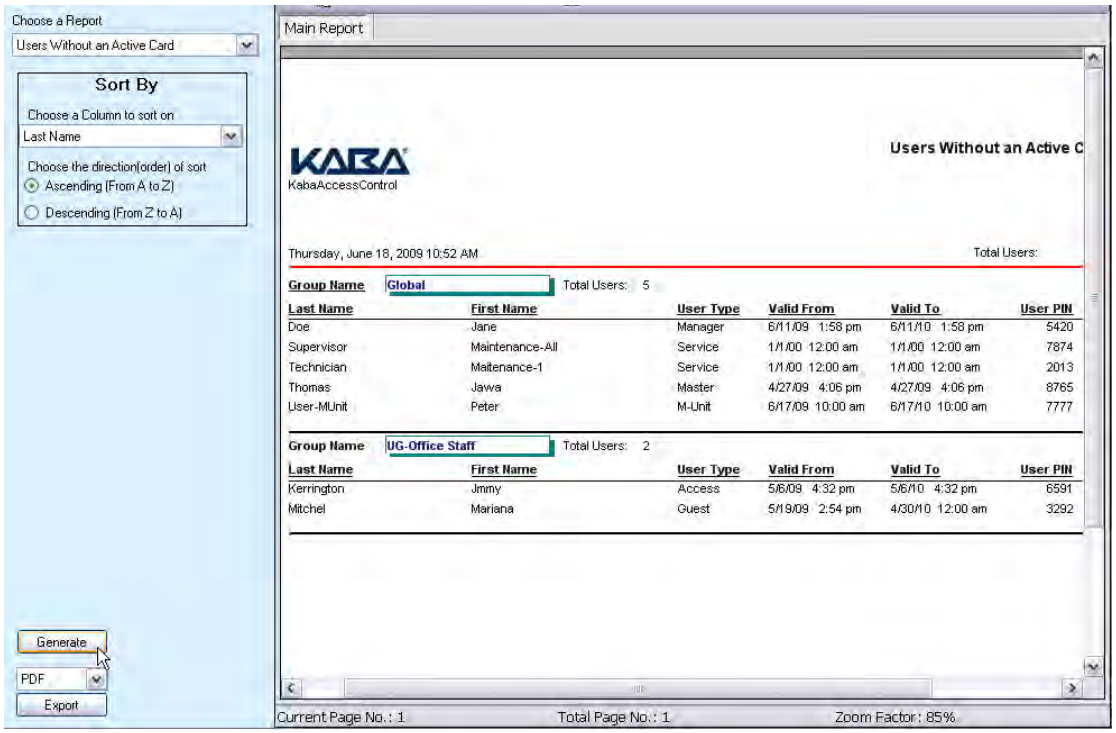
The Users for a Door report allows you view all users assigned to a particular door in the Enterprise software.



From this window, you can print and export/save the Users for a Door report.

Users Without an Active Card Report

The Users Without an Active Card report displays all users that have been defined in the E-Plex Enterprise software but have not been assigned a card/token yet.


Choose a Report
Users Without an Active Card
Sort By
Choose a Column to sort on
Last Name
Choose the direction(order) of sort
Ascending (From A to Z)
Descending (From Z to A)
Generate
PDF
Export
Main Report
KABA
KabaAccessControl
Users Without an Active C
Thursday, June 18, 2009 10:52 AM
Total Users:
Group Name Global Total Users: 5
Last Name First Name User Type Valid From Valid To User PIN
Doe Jane Manager 6/11/09 1:58 pm 6/11/10 1:58 pm 5420
Supervisor Maintenance-All Service 1/1/00 12:00 am 1/1/00 12:00 am 7874
Technician Maitenance-1 Service 1/1/00 12:00 am 1/1/00 12:00 am 2013
Thomas Jawa Master 4/27/09 4:06 pm 4/27/09 4:06 pm 8765
User-MUnit Peter M-Unit 6/17/09 10:00 am 6/17/10 10:00 am 7777
Group Name UG-Office Staff Total Users: 2
Last Name First Name User Type Valid From Valid To User PIN
Kerrington Jimmy Access 5/6/09 4:32 pm 5/6/10 4:32 pm 6591
Mitchel Mariana Guest 5/19/09 2:54 pm 4/30/10 12:00 am 3292
Current Page No.: 1
Total Page No.: 1
Zoom Factor: 85%

From this window, you can print and export/save the Users Without a Card report.

4 Operating the E-Plex Lock at its Keypad

This section describes how to operate the Enterprise software driven E-Plex lock at the lock keypad, including the following topics:

- **Error! Reference source not found.**
- **Error! Reference source not found.**
- Initial Programming of the Lock

Overview of the Lock

The E-Plex lock series that can be operated by the E-Plex Enterprise software system are:

EE5200, E5600 and E5700 – "Standard" locks
EE5200 SAC, E5600 SAC and E5700 SAC – Standalone Access Controllers
E3200, E3600 and E3700 – Narrow stile locks

Please refer to the "***E-Plex 3xxx/5xxx Lock Series Operations Manual***" for detailed lock keypad commands and operations of each of these models.

This section will provide an overview of only the "standard" E5xxx lock series which includes the following topics:

- **Error! Reference source not found.**
- **Error! Reference source not found.**
- **Error! Reference source not found.**
- **Error! Reference source not found.**

States of the Lock

There are four states of the E-Plex lock: 1- (default) Factory Mode, 2- Access Mode by "LearnLok, 3- Access Mode by Software and, 4- Pushbutton Programming Mode.

Factory Mode

The default Factory Mode is one of four primary states of the lock. The main characteristics of this state include the following:

The E-Plex lock opens only when the 8-digit factory default Master user PIN -> 1-2-3-4-5-6-7-8 is entered at the lock keypad.

The visual indication for "access granted" is the green LED flashing once. A high-pitched tone is also generated while the green LED is on.

The Master User must change this factory default Master PIN to be able to exit permanently from the Factory Mode and switch to the normal Access Mode (by LearnLok or by software) and its Pushbutton Programming Mode of operations.

Access Mode by "LearnLok"

This mode refers to the lock that is operational for user access after the factory default Master PIN of 12345678 is changed to something else. When the lock enters the Access Mode in LearnLok mode, the Master (and Manager users) can add or delete regular users in the lock simply by entering relevant command codes at the lock keypad. Please refer to the "***E-Plex 3xxx/5xxx Lock Series Operations Manual***" for details.

Access Mode by Software

This mode refers to a lock that is operational for user access after it is programmed by the M-Unit with its lock/user configuration data downloaded from the E-Plex Enterprise system software. When the lock enters the Access Mode, the method of lock access is either by, (i) PIN only, or by (ii) Card only, or by (iii) PIN followed by the associated Card -> Prox or Smart (Mifare, DESFire or iClass).

Note: The Service users can have PIN only access (ie., no tokens).

Access Mode refers to a lock that is fully operational for user access and not in Factory Mode. You will operate the lock in conjunction with the E-Plex Enterprise software and the portable PC M-Unit by programming the lock with valid user access credentials etc.

Pushbutton Programming Mode

The E-Plex lock enters the Pushbutton Programming Mode when the Master user or one of the Manager users enters the **# key first** on the lock keypad, followed by presenting the credential (PIN, Card or PIN followed by Card) to put the lock in programming mode. Once the lock is in the Pushbutton Programming Mode, the Master/Manager can enter one or more command sequences. Each command sequence **ends with a # key** that acts like an <Enter> button on a PC keyboard. At the very end of all sequences of programming commands, enter **one more # key** to remove the lock from the Pushbutton Programming Mode and return to the normal Access Mode.

Battery Life and Replacement

The E-Plex locks use four “AA” alkaline batteries. A variety of factors will determine how long your lock operates on a set of batteries, including the following:

- Shelf life of the batteries
- Number of openings per day
- Environmental conditions
- Battery brand
- Access credential settings (PIN only, Card only or both PIN & Card)
- Lock parameter settings

In most cases, you can expect between 50,000 and 90,000 openings per set of 4 AA alkaline batteries, and about triple this range if you use the optional 4 C alkaline battery pack kit.

A flash of both red and green LEDs identifies a low battery condition when a valid credential is presented, and the lock will still open. Though under ideal conditions the lock will keep operating for another thousand or so openings, the batteries should be replaced as soon as possible when you observe a low battery condition,

Battery Pack Replacement

Always replace all four batteries in the pack with good quality, AA alkaline batteries. If you replace the batteries within two to three minutes, the lock will continue working as before, granting and denying access to users based on their access schedules.

If the battery replacement time is longer than two to three minutes, you will lose the current date and time of the lock from its memory, even though all users and locks configuration parameter information will not be lost. When the lock loses its date/time, all of your access schedule times will be out of sync, thus denying access to valid users. In this case, you must update the lock’s date/time with the current date/time.

To update the current date & time you can either use the lock keypad command sequences 001# and 002# along with the current date and current time parameters, or simply re-program this lock with its proper lock ID using the portable M-Unit. This is described in detail in ***E-Plex PC M-Unit User Guide***.

Important: *Please ensure that your M-Unit’s current date and time are set correctly before synchronizing with the lock. If you forget to update the date/time, the lock will keep flashing the red LED every 10 seconds or so as a reminder until the lock’s date/time is updated.*

Note: *In rare instances, when you reconnect the lock with new batteries, the lock may not re-initialize properly; a typical symptom is that the lock does not recognize any pushbutton input. If this happens, disconnect the battery pack, press any one of the pushbuttons for a minimum of 2 seconds to discharge the built-in circuit capacitance, and then re-connect the battery pack. Wait a couple of seconds until you see the green LED flash once, followed by the sound of the motor crunching and a high pitched beep indicating that the lock has re-initialized properly.*

Sequence of Operations

This section describes the sequence of operations for accessing and programming the E-Plex lock.

- With the lock still in Factory Mode, do the following:
- Program the “Lock Function” of the lock if you want it to be anything other than the factory default “Entry” lock function.

Configuring the Lock Functions

Before putting the lock in service, you must first program the lock function when still in Factory Mode. The default lock function for any lock from the factory is “Entry” lock function, which is the same as a Cylindrical lock without a privacy thumbturn, or a Mortise lock without a deadbolt, or an Exit Trim lock. The command codes involved here are 011# and 013#.

Note: Refer to the separate “E-Plex 5X00 Lock Function Setup Guide” for instructions on changing to the desired BHMA lock function.

- Change the Factory Master user PIN to your own Master PIN (always eight digits) to place the lock in Access Mode.

  The lock is now “activated” and can be programmed using the M-Unit. For Error! Reference source not found. using the M-Unit, please refer to the *E-Plex P M-Unit User Guide*.

Default Values of the E-Plex Lock Programmable Parameters

Parameters	**Factory Default Values**
Date (MM/DD/YY)	01/01/00
Time (HH:MM)	00:00
Lock state	Un-programmed
BHMA Lock function	Entry
Manual Passage Mode open time limit	4 hours
Passage Mode	Disabled
Lockout Mode	Disabled
Unlock time	2 seconds
Buzzer volume control	Low (=1)
Tamper shutdown time	30 seconds
Tamper attempt count	4 attempts
Access PIN length	4 digits

Parameters	Factory Default Values
Master PIN	12345678 (Eight digits)
Privacy privilege	Disabled
Remote unlock	Disabled

Initial Programming of the Lock

Once the required lock function is set, the lock must be programmed by the Master or the Manager(s) for everyday use. This section provides information about the initial programming of the lock, including the following:

- **Error! Reference source not found.**
- **Error! Reference source not found.**
- **Error! Reference source not found.**
- **Error! Reference source not found.**
- **Error! Reference source not found.**
- Visual Feedback Message Definitions

Entering Pushbutton Programming Mode

This section describes the sequence of tasks to program the lock at its keypad in Pushbutton Programming Mode.

- Put the lock in Pushbutton Programming Mode by pressing **# Master or Manager Credential** (PIN, or Card, or PIN followed by Card) #.
- Use the Error! Reference source not found. table found later in this Chapter to enter the 3-digit command sequence (command type + function code), followed by #.
- Enter the appropriate command codes as required.
- Press # to end Pushbutton Programming Mode.
- Once the lock is in Pushbutton Programming Mode, multiple command sequences can be entered (chaining of command codes) without having to repeat the **# Credential #** every time. However, if there is no activity for 5 seconds at the keypad, the lock will automatically exit from Pushbutton Programming Mode and return to its normal Access mode.

  Example:

  If the Master or Manager User, or any user of the system with a valid credential presents her/his credential the lock will open (lock is normally in Access mode) .

  If the Master or Manager(s) enters **#Credential#,** the lock will enter the Pushbutton Programming mode and will wait for the next part of the command code(s) sequence.

  When s/he enters one more # at the end of the command code sequence, the lock will exit the Pushbutton Programming mode and revert back to its normal Access mode.

Note 1: *The # (pound sign) acts like the Enter key on a keyboard in your communications with the lock. The # tells the lock that one part of the entry is finished. The # serves another purpose—to distinguish a programming type command from a simple access code to open the door. A Master or Manager User can use the same Credential to open the door or to*

put the lock in Pushbutton Programming Mode, the only difference being that s/he uses the # sign in front to signal that s/he is about to enter a programming command.

Note 2: Correct errors during a command sequence. *If an invalid entry occurs, recover from the mistake by entering the (*) key, which will clear all entries made from the beginning of the current command sequence and will reset the 5-second time limit for entering the command code again. In this case, you still have 15 seconds from the first number entered to enter the whole command code sequence.*

Modifying the Master User PIN

Required User Level: Master

To change the factory Master PIN or current Master PIN, follow these steps:

- Put lock into Pushbutton Programming Mode by pressing the **#** key.
- Use the command, **000**, for Master, and then enter the new Master PIN number.
- You must use eight digits between 00000001 and 99999999 as follows: **000# MMMMMMMM#**; for example, **000# 87654321#**.
- Enter the Master PIN again: **87654321#** for confirmation.

  Example of complete entry: **000# 87654321# 87654321#**.
- Key in another # to indicate the end of Pushbutton Programming Mode.
- After you are finished, you will always have to use this new Master PIN as part of your access credential, depending on if the Master is configured in the software to user either PIN only or PIN followed by card for programming/auditing the lock, and also for normal door access.
- **Important:** Please write down the PIN and keep store it in a safe place. You should enter this same 8-digit Master PIN in the E-Plex Enterprise initial software configuration screen (for the Master PIN) also, to be consistent. The factory Master PIN of 12345678 is no longer valid from this point.

Additional Pushbutton Keypad Commands

The following operations (except for setting up date & time which are also done through the software via the portable M-Unit) can only be performed at the lock's keypad. All other functions must be set up and sent from the E-Plex Enterprise software via the M-Unit:

- Setting date and time (commands 001# and 002#)
- Activating/de-activating Passage Mode (command 399#)
- Increasing/decreasing programmed Passage Mode duration (command 005#)
- Activating/de-activating global Lockout Mode (command 499#)
- Performing manual diagnostics (command 500#)
- Identifying an E-Plex lock model (command 501#)
- Start M-Unit communication session with the lock (command 900#)

Setting Date and Time (Commands 001# and 002#)

The following two commands are performed one after the other in sequence to set up the lock with current date and time. The factory default is 01/01/2000 00:00 when you first connect the battery pack and so must be changed to reflect the actual/current date & time.

Required User Level: Master

- Put the lock into Pushbutton Programming Mode.
- Enter command **001#** followed by MMDDYY# and again MMDDYY#, where MM=01 to 12 (Month), DD=01 to 31 (Day) and YY=08 to 99 (Year).

3. Enter command **002#** followed by HHMM# and again HHMM#, where HH=00 to 23 (Hour) and MM=00 to 59 (Minute).

4. Enter another **#** to indicate the end of programming.

Note: *The date and time can also be set by the M-Unit. Whenever you program the lock with the M-Unit, the M-Unit automatically sends the current date, time and the DST setting from its settings to the lock and so they should have been set correctly.*

Activating/De-activating Passage Mode (Command 399#)

You have already set up in the software a duration for a lock to remain in manual Passage Mode (default is 4 hours, though in the lock in its "LearnLok" mode, the default is 9 hours) and enabled it. When you activate manual Passage Mode at the lock keypad, it becomes active for the duration you have set in the software.

If your duration is setup as six hours, and you manually activate Passage Mode, say at 10:00 a.m., it will automatically re-lock at 4:00 p.m. Even if the lock was taken in and out of Passage Mode multiple times during this six-hour period, it will still re-lock after six hours from the original starting period. This ensures that a lock will never remain in Passage Mode beyond the programmed time period.

Note: *This manual Passage Mode function is different from the automatic access schedule-based Passage Mode setup in the software.*

Required User Level: Master, Manager

1. Put the lock into Pushbutton Programming Mode.
2. Enter command **399#** to activate/de-activate Passage Mode.

- Enter the code where **1** = activate Passage Mode and **0** = de-activate Passage Mode.

  An example of complete entry to activate Passage Mode is **399#1#** and to de-activate Passage Mode, it is **399#0#**.

- Enter another **#** to indicate the end of Pushbutton Programming Mode.

Increasing/Decreasing Passage Mode Duration Temporarily (Command 005#)

As in the above example, say your manual passage mode duration is programmed for duration of six hours. So if you manually activated Passage Mode at 10:00 a.m., it will automatically re-lock at 4:00 p.m. However, there may be times when you may want to either shorten or prolong this remaining passage mode duration temporarily on that day (only) by a few hours. You can do this but you must enter this command sequence before the expiry of

the current passage mode end time. Keep in mind that the next day onwards, the manual passage mode duration that was set originally will take effect again.

Required User Level: Master, Manager

1. Put the lock into Pushbutton Programming Mode.
2. Enter command **005# HH#** where HH=01 to 24 hours.

   Let us take the same example as before -> activate manual passage at 10 a.m. so that it will automatically end at 4 p.m. after 6 hours. But if you want to temporarily shorten the current duration by say, 1 hour to end at 3 p.m., then you must enter HH=01 at around 2:00 p.m.

   Similarly, if you want to temporarily extend the current duration by say, 2 more hours to end at 6 p.m., then you must enter HH=02 just before around 4:00 p.m.
3. Enter another # to indicate the end of Pushbutton Programming Mode.

Activating/De-activating Lockout Mode (Command 499#)

You may need to use the global Lockout Mode, for example, during a fire or an emergency evacuation when you do not want anyone to return to his or her office. This procedure will de-activate all regular user access credentials that are active, including Manager credentials, but excluding the Master credential.

Important: Use extreme care in using this command because if you (the Master) forget to de-activate the lockout mode after activating it, nobody in the facility will have access to the door anymore.

Required User Level: Master

- Put the lock into Pushbutton Programming Mode.
- Enter command **499#** for Lockout Mode (all except Master).
- Enter **1#** to activate Lockout Mode and **0#** to de-activate it.

  Example of complete entry: **499#1#** or **499#0#**.
- Enter another # to indicate the end of programming.
- You have now activated or de-activated Lockout Mode.

Performing Manual Diagnostics (Command 500#)

Use the diagnostics code to perform manual diagnostics of the lock, green LED, red LED, buzzer, and the 12 pushbuttons—0 through 9, *, and #.

Required User Level: Master, Manager

- Put the lock into Pushbutton Programming Mode.
- Enter command **500#** for diagnostics. You will see a green LED and hear a high beep followed by a red LED and a low beep.
- Press **123456789*0#**, in that exact order, to test each pushbutton. If every pushbutton is working correctly, you will see a green LED and hear a normal beep for each pushbutton that is pressed.

  Example of a complete entry: **500#123456789*0#**.
- Enter another # to indicate the end of programming.
- If you see a red LED at any time when pressing a pushbutton indicates a possible

problem with the pushbuttons electronics.

- Enter another # to indicate the end of programming.
- If the above sequence did not pass even after two or three tries, please contact Kaba's technical support line to resolve the issue.

Identifying a Lock Model (Command 501#)

Use the Lock Model Identification code to identify if the lock model series is an E32xx/52xx, or an E36xx/56xx, or an E37xx/57xx.

Required User Level: Master, Manager

- Put the lock into Pushbutton Programming Mode.
- Enter command **501#** for Lock Model Identification.
- E32xx/52xx: The lock will flash the red and green LEDs two times with accompanying two high-pitched tones.
- E36xx/56xx: The lock will flash the red and green LEDs six times with accompanying six high-pitched tones.
- E37xx//57xx: The lock will flash the red and green LEDs seven times with accompanying seven high-pitched tones.
- Enter another # to indicate end of programming.

Resetting the Lock

You can return to factory default parameters by performing a Hard Reset. This returns the lock to Factory Mode, including deleting all credentials, putting the lock back to factory default values (four-digit access PIN length), and making the Master PIN **12345678**. Also, the lock function will revert to the default "Entry" lock function. A hard reset is performed as follows (example for E-Plex 5xxx locks only):

- Insert the mechanical override key, turn to retract latch, and hold in (lock) open position.
- Within five seconds, press # and then release the key (latch extends back to relock).
- While the red/green lights flash alternately, press **12345678#** on keypad.
- The lock will reset. You will see two flashes of the green light with a corresponding high pitch tone, followed by the sound of the lock motor "crunch," indicating that the reset was successful.
- The lock is now reset to the Factory Mode and the Master PIN is now 12345678.

Note: *The hard reset operation does NOT delete any audited events stored in the lock, for security reasons.*

Summary of Pushbutton Programming Commands

Name	Command	Description	Authorization
Configuration	000 # MMMMMMMM# MMMMMMMM#	Modify Master User PIN (always eight digits)	Master
Set Date	001# MMDDYY# MMDDYY#	Setup current Date MM = 01 or 12; DD = 01 to 31; YY = 08 to 99	Master
Set Time	002# HHMM# HHMM#	Setup current t Time HH = 00 or 23; MM = 00 to 59	Master
Set Temporary Passage Mode Duration	005# HH#	Setup Temporary Passage mode Duration HH = 00 or 24	Master, Manager
Manual Passage Mode	399# P#	Activate/de-activate Passage Mode P = 0 or 1; 0 = disable Passage Mode; 1 = enable Passage Mode	Master, Manager
Global Lockout Mode	499# L#	Activate/de-activate Lockout Mode (Master User is not affected by global Lockout Mode) L = 0 or 1; 0 = disable Lockout Mode; 1 = enable Lockout Mode	Master
Diagnostics	500# 123456789*0#	Manual diagnostics	Master, Manager
Lock Model Identification	501#	Identify if the lock is an E-Plex 32xx/52xx, or 36xx/56xx, or 37xx /57xx: 2 sets of green and red LEDs flash for E32xx/5200; 6 sets of same flash sequence for E36xx /56xx; and 7 sets of same flash sequence for E37xx/57xx.	Master, Manager
Communication Startup	900#	IrDa Communication startup between the lock and M-Unit PDA	Master, Manager

Visual Feedback Message Definitions

Condition	Parameters			
	Green LED	**Red LED**	**Duration**	**Rate**
Valid pushbutton pressed	ON	OFF	1/10 sec	Once
Timeout expired	OFF	ON	1 sec	Once
Valid access credential entered/presented	ON	OFF	1/10 sec	Once
Access granted	ON	OFF	1/10 sec	1 sec
Access granted (battery low condition)	ON	ON	1/10 sec	1 sec
Access denied	OFF	ON	1 sec	Once
Valid programming entry	ON	OFF	1 sec	Once
Invalid programming entry (including duplicate access credential)	OFF	ON	1 sec	Once
Tamper shutdown beginning	OFF	ON	2 sec	Once
Tamper shutdown state	OFF	ON	1 sec	10 sec
Tamper shutdown ending	ON	OFF	2 sec	Once
*Communication starting	ON	OFF	1 sec	Once
*Communication ending	ON	OFF	1 sec	Once
*Communication aborted	OFF	ON	1 sec	Once
*Communication in progress	ON (Alternate)	ON (Alternate)	1/10 sec	1 sec
Deadbolt/Thumbturn Privacy Activated	OFF	ON	1 sec	Once
Deadbolt/Thumbturn Privacy De-activated	ON	OFF	1 sec	Once
Hard Reset sequence progress	ON (Alternate)	ON (Alternate)	½ sec	Continuously
Hard reset sequence ended successfully	ON	OFF	2 sec	Once
Hart Reset sequence failed	OFF	ON	2 sec	Once
Hard Reset sequence progress	ON (Alternate)	ON (Alternate)	½ sec	Continuously
Hard reset sequence ended successfully	ON	OFF	2 sec	Once
Hard reset sequence ended successfully	OFF	ON	2 sec	Once

5 Programming and Auditing Locks

A PC based Maintenance Unit called the “M-Unit” - either the same laptop PC where the Enterprise & PC M-Unit software is installed, or a separate independent mini laptop / Netbook PC is used as a portable device, The main two functions of the portable M-Unitb are:

- to send (upload) data to for the purpose of programming a lock, and
- to receive (download) data from the lock for the purpose of auditing the lock’s events.

The data transfer between the portable M-Unit and the E-Plex lock is via the industry standard IrDa interface, working in conjunction with ***Kaba’s E-Plex PC M-Unit Communications Kit.***

Portable PC M-Unit with Kaba's IrDA Kit

The "M-Unit" is Kaba Access Control system's term for a PC based portable unit that communicates with the locks through industry standard infrared (IrDa) interface by making use of *Kaba' PC M-Unit Communications Kit.* The kit contains the following items in the package:

IrDa Adapter

USB Extension Cable

USB Flash Drive

Netbook PC (as portable M-Unit)

1. An industry standard ***IrDA*** *(Infrared Data Access)* ***adapter*** *with a USB interface* to connect to the M-Unit PC,

2. A ***USB extension cable*** to connect the above IrDA adapter to the M-Unit, if need be, and

3. A ***USB flash drive***, preloaded with the *E-Plex PC M-Unit software* application along with its *User Guide* in electronic format,

4. A 2-page "Getting Started" sheet in color as a quick reference guide.

One end of the IrDA adapter plugs in to one of the M-Unit's USB ports and the other end of the IrDa transmit/receive infrared data window will be pointed at the E-Plex lock's IrDa window to transfer required data between the M-Unit and the lock.

The USB memory drive will be used (after installing the PC M-Unit software on the separate Netbook PC) to store and transfer the lock configuration data and the audited events data between the M-Unit and the Host PC where the main E-Plex Enterprise applications its locks/user access configuration database reside. The USB flash drive will be used as a portable transport medium between the two non-networked PCs – i.e., between the Host PC and the portable M-Unit.

Optionally, if your Host PC operates under a networked environment, either by ***wired LAN*** (Local Area Network) or by ***wireless LAN***, you will not need the USB drive to transfer data between the Host and the M-Unit. You can simply make use of the **Host PC's IP address** to transfer data between the two PCs over the network.
Important: Please consult with your local IT personnel on how to setup your Host PC's network IP addressing and related schemes.

Note: If on the other hand, you use the same laptop which contains the main Enterprise applications and the M-Unit applications (built-in), you will not need the flash drive to transfer data; this is because this data transfer and syncing occur within the same laptop's hard-drive.

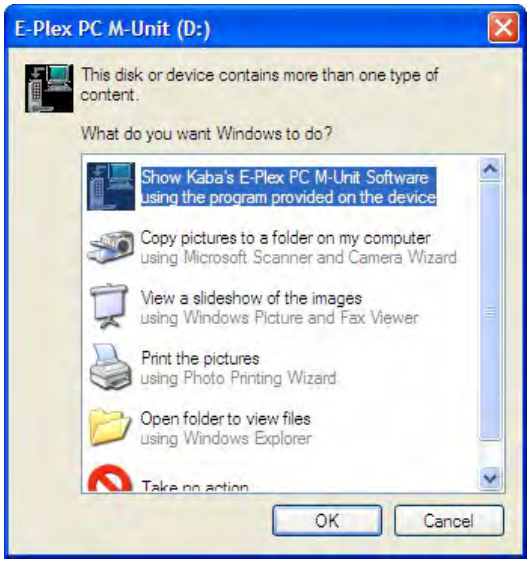
PC M-Unit Software Installation

This procedure is for installing the PC M-Unit part of the software on the separate portable Netbook or mini laptop; the Enterprise applications software should have been already installed and running on the Host PC.

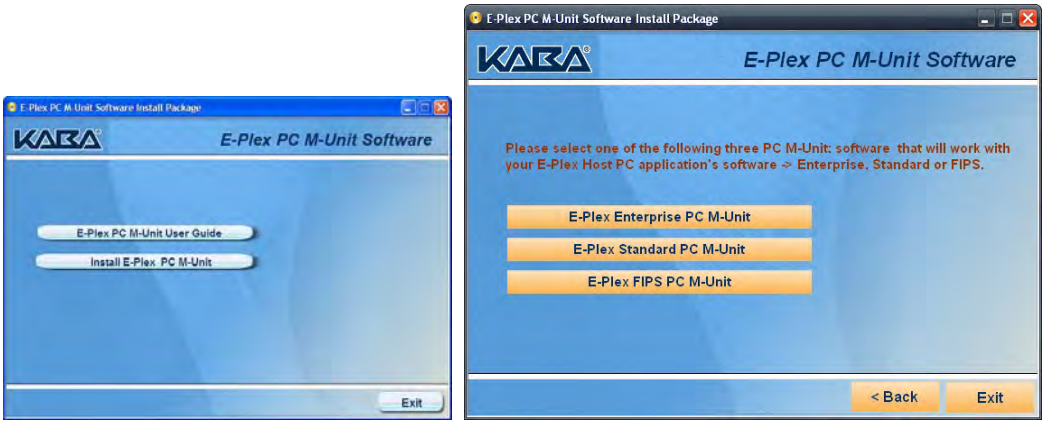
Important: If you are using one/same ("integrated") portable PC where the *E-Plex Entreprise* software was installed, you can skip the next few pages and go directly to the Section on ***Page 5-9*** -> ***Automatic PC/M-Unit Sync.*** This is because the *E-Plex PC M-Unit* part of the software already resides within the main Enterprise software and so no separate PC M-Unit installation is required.

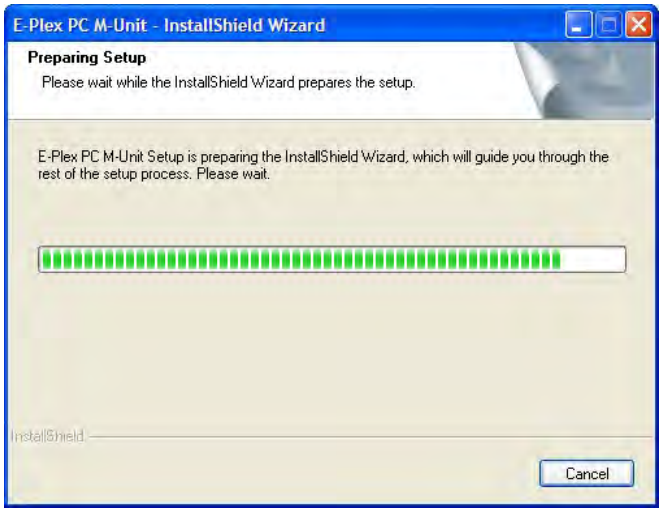
Note: This same PC M-Unit installation procedure can also be found in the ***PC M-Unit User Guide***. It is shown here again in this document for convenience. Please also refer to the 2-page color, ***E-Plex PC M-Unit Getting Started*** sheet as a quick reference guide.

- The *E-Plex PC M-Unit Software* and the *PC M-Unit User Guide* are located on the USB flash drive that comes with *Kaba's PC M-Unit Communications Kit.*
- Plug in this USB drive into one of the USB ports of your dedicated M-Unit (Laptop or Netbook PC).
- In a few seconds, you will see the following screen on your M-Unit portable unit. Ensure that "*Show Kaba's E-Plex PC M-Unit Software …*" is highlighted. Click *OK* to continue which will open the next window, giving you an option to either view/print the *PC M-Unit User Guide* or install this software.

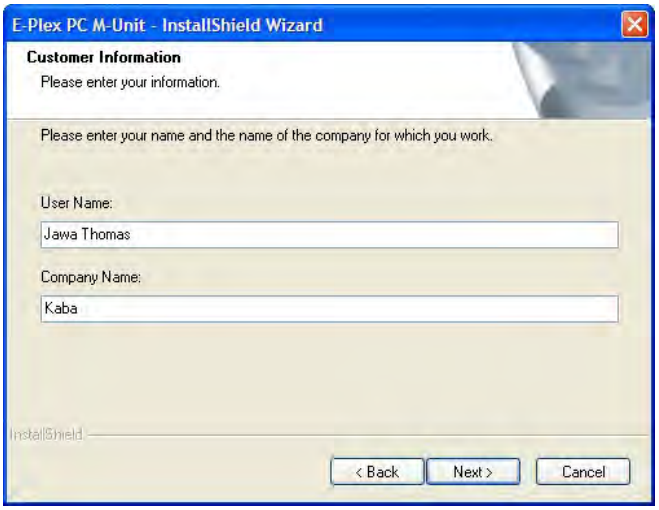

E-Plex PC M-Unit (D:)
This disk or device contains more than one type of content.
What do you want Windows to do?
Show Kaba's E-Plex PC M-Unit Software using the program provided on the device
Copy pictures to a folder on my computer using Microsoft Scanner and Camera Wizard
View a slideshow of the images using Windows Picture and Fax Viewer
Print the pictures using Photo Printing Wizard
Open folder to view files using Windows Explorer
Take no action
OK
Cancel

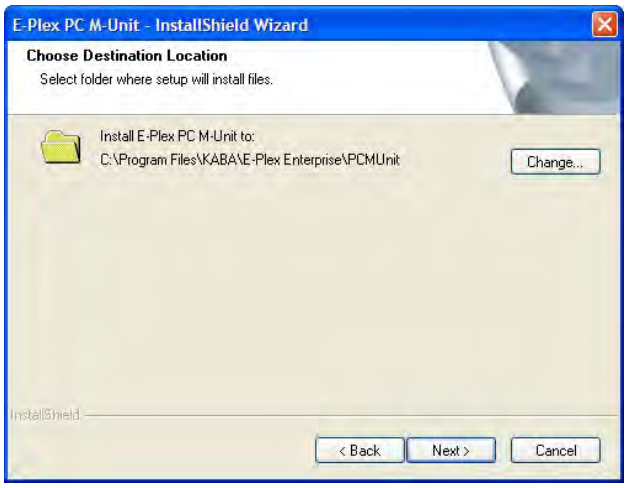
- Click "*Install E-Plex PC M-Unit"* and then select and click *"E-Plex Enterprise PC M-Unit". T*he software installation process will begin and you need to just follow the instructions on the screen. The following are a few screen shots taken during the install process. Click *Finish* when done.

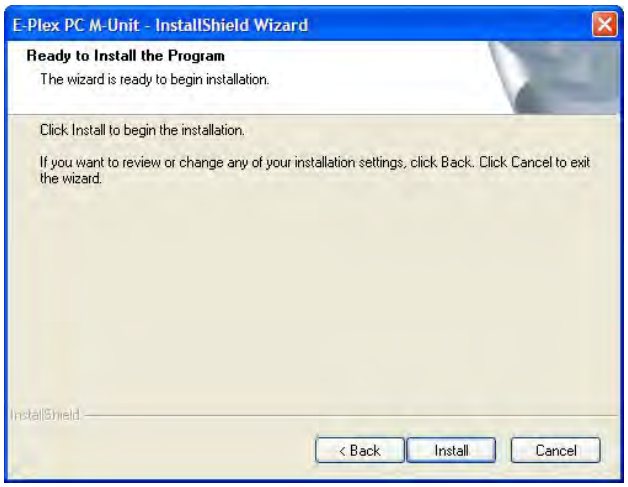

E-Plex PC M-Unit Software Install Package
KABA
E-Plex PC M-Unit Software
E-Plex PC M-Unit User Guide
Install E-Plex PC M-Unit
Exit
E-Plex PC M-Unit Software Install Package
KABA
E-Plex PC M-Unit Software
Please select one of the following three PC M-Unit: software that will work with your E-Plex Host PC application's software -> Enterprise, Standard or FIPS.
E-Plex Enterprise PC M-Unit
E-Plex Standard PC M-Unit
E-Plex FIPS PC M-Unit
< Back
Exit

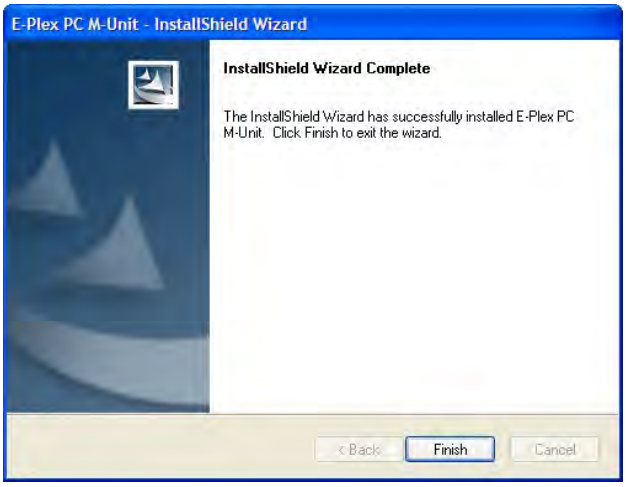

E-Plex PC M-Unit - InstallShield Wizard
Preparing Setup
Please wait while the InstallShield Wizard prepares the setup.
E-Plex PC M-Unit Setup is preparing the InstallShield Wizard, which will guide you through the rest of the setup process. Please wait.
InstallShield
Cancel

E-Plex PC M-Unit - InstallShield Wizard
License Agreement
Please read the following license agreement carefully.
IMPORTANT - USE OF THIS SOFTWARE IS SUBJECT TO LICENSE RESTRICTIONS
CAREFULLY READ THIS LICENSE AGREEMENT BEFORE USING THE SOFTWARE
ENTIRE AGREEMENT: This end-user license is a legal agreement between you ("Purchaser") and Kaba Ilco Inc. (hereinafter KABA). It constitutes the entire agreement ("Agreement") between Purchaser and KABA on the license and use of the Software, and supersedes any and all prior agreements and documents unless expressly incorporated herein. USE OF THIS SOFTWARE INDICATES YOUR COMPLETE AND UNCONDITIONAL ACCEPTANCE OF THE TERMS AND CONDITIONS SET FORTH IN THIS AGREEMENT. If you do not agree to these terms and conditions, promptly return or, if received electronically, certify the destruction of the Software and all accompanying items within five days after their receipt, in order to receive a full refund of any license fee
I accept the terms of the license agreement
I do not accept the terms of the license agreement
Print
InstallShield
< Back
Next >
Cancel


E-Plex PC M-Unit - InstallShield Wizard
Customer Information
Please enter your information.
Please enter your name and the name of the company for which you work.
User Name:
Jawa Thomas
Company Name:
Kaba
InstallShield
< Back
Next >
Cancel


E-Plex PC M-Unit - InstallShield Wizard
Choose Destination Location
Select folder where setup will install files.
Install E-Plex PC M-Unit to:
C:\Program Files\KABA\E-Plex Enterprise\PCMUnit
Change...
InstallShield
< Back
Next >
Cancel


E-Plex PC M-Unit - InstallShield Wizard
Ready to Install the Program
The wizard is ready to begin installation.
Click Install to begin the installation.
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.
InstallShield
< Back
Install
Cancel


E-Plex PC M-Unit - InstallShield Wizard
InstallShield Wizard Complete
The InstallShield Wizard has successfully installed E-Plex PC M-Unit. Click Finish to exit the wizard.
< Back
Finish
Cancel

- The E-Plex PC M-Unit software is now installed on your separate M-Unit portable unit and the program's icon will be displayed on your PC M-Unit's Desktop as shown below. Whenever you want to run this program, double click on this icon.

- For the very first time of PC M-Unit login, the default login User name is "kaba" and the default Password is also "kaba". Please refer to the *"E-Plex PC M-Unit User Guide"* for detailed operational use of this program.
- The main operations involving the M-Unit are the following:
    - Downloading doors/users access configuration data to the M-Unit from the Host PC
    - Programming the doors (locks) using the M-Unit via IrDA
    - Auditing the doors (locks) using the M-Unit via IrDA
    - Uploading doors' configuration info and audits to the Host PC from the M-Unit
    - Performing lock maintenance/diagnostics via IrDA

Note: The functionality and features of the E-Plex PC M-Unit software is generic, so it will work with most of Kaba's E-Plex lock models and their related SACs (Stand-Alone Access Controllers) such as:

E3200, E3600, E3700, E5200, E5600, E5700 Series – with E-Plex Enterprise software (this software)
E5800 Series – with E-Plex FIPS (General & High A.) software
E3000, E5000 Series – with E-Plex Standard software

M-Unit User Definition

- In addition to the global Master user, specific Door Group Managers and the other Manager users, there can be M-Unit user types who can also program and audit the E-Plex Enterprise software based locks using the M-Unit. This M-Unit user's credential is used only to program and/or audit the lock as a maintenance function only, ie. the M-Unit credential will NOT open the lock. When an M-Unit User

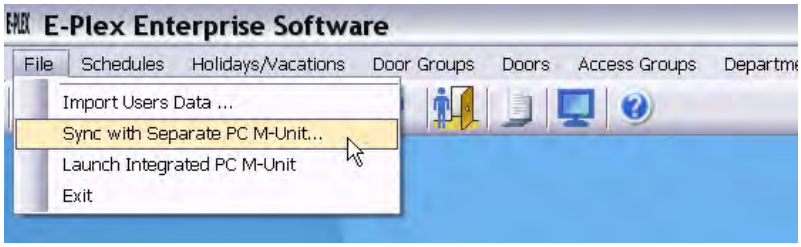
presents her/his M-Unit credential, the lock enters the Communications Mode with the M-Unit handheld immediately (equivalent to entering the command sequence: # Master credential #, or # Manager's credential #, followed by 900#), indicated by alternate green and red flashing LEDs. Now the M-Unit User can program or audit the lock.

> **Important:** *Ensure that the current date and time on your system PC and your portable M-Unit are accurate, including the Daylight Saving Time setup. If the date and time are not correct, your users will not be able to access the lock even if they have the right credentials.*

Manual PC/M-Unit Sync (Data Transfer with "Separate" PC M-Unit via a USB flash drive)

You must perform the manual data transfer, both from the E-Plex Enterprise Host PC's side and from the separate portable PC M-Unit's side as described below. Ensure that both the E-Plex Enterprise and the E-Plex PC M-Unit programs are running on both PCs (Host and M-Unit).

From the main menu of E-Plex Enterprise software, click ***File*** and then ***Sync with Separate PC M-Unit…***



From this point on, please refer to the ***E-Plex PC M-Unit User Guide*** on how to perform the data transfer manually between the two devices via a USB flash drive. The E-Plex PC M-Unit user guide is included as an electronic document on the USB flash drive of the ***E-Plex PC M-Unit kit***.

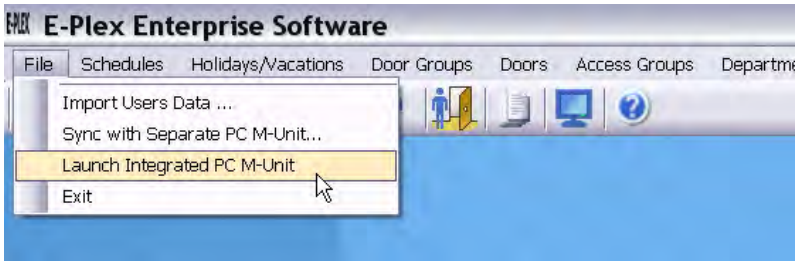
Data Transfer via IP Addressing: The M-Unit data transfer between the Host PC and the PC M-Unit can also be performed via the Host PC's IP address without having to use the USB flash memory drive. In this case, the data transfer is initiated only from the PC M-Unit side as "Download Doors" (to M-Unit) or as "Upload Audits" (to Host PC). The transferred data will be automatically stored, both in the Host PC's and the M-Unit's respective databases; no "initiate data transfer" action is necessary from the Host PC's side. Please refer to the E-Plex *PC M-Unit User Guide* for more details on how to transfer data between the Host PC and the M-Unit via the IP Addressing scheme. You must have either wired or wireless network connection for the Enterprise Host PC and the M-Unit for this IP address based data transfer to function.

Note: If on the other hand you use one/same standalone laptop PC as one "integrated" PC to run both the E-Plex Enterprise application and the PC M-Unit application, go to the next section -> ***Automatic PC/M-Unit Sync***.

Automatic PC/M-Unit Sync (Data Transfer within the same "Integrated" Laptop PC which acts as both Host PC & PC M-Unit)

If you use one/same standalone laptop PC to run both the E-Plex Enterprise software as a Host PC and the PC M-Unit software (as a portable PC M-Unit), the system automatically does the data sync transfer without you having to specify and use a common folder location on the hard drive, or on the USB flash drive like you do with "Manual" data sync transfer on a separate Netbook PC; also, no network connection is required. You will still need to connect and use the IrDA interface adapter with this laptop PC when programming and/or auditing an E-Plex lock. In this case, this same "integrated" laptop PC functions both as the Host PC running the E-Plex Enterprise software and as the portable PC M-Unit running the PC M-Unit software within.

From the main menu of *E-Plex Enterprise software*, click ***File*** and then ***Launch Integrated PC M-Unit*** to open the main *PC M-Unit software* screen.



From this PC M-Unit menu you can,

(i) download users <-> locks access configuration data for each selected E-Plex lock from the Host PC,

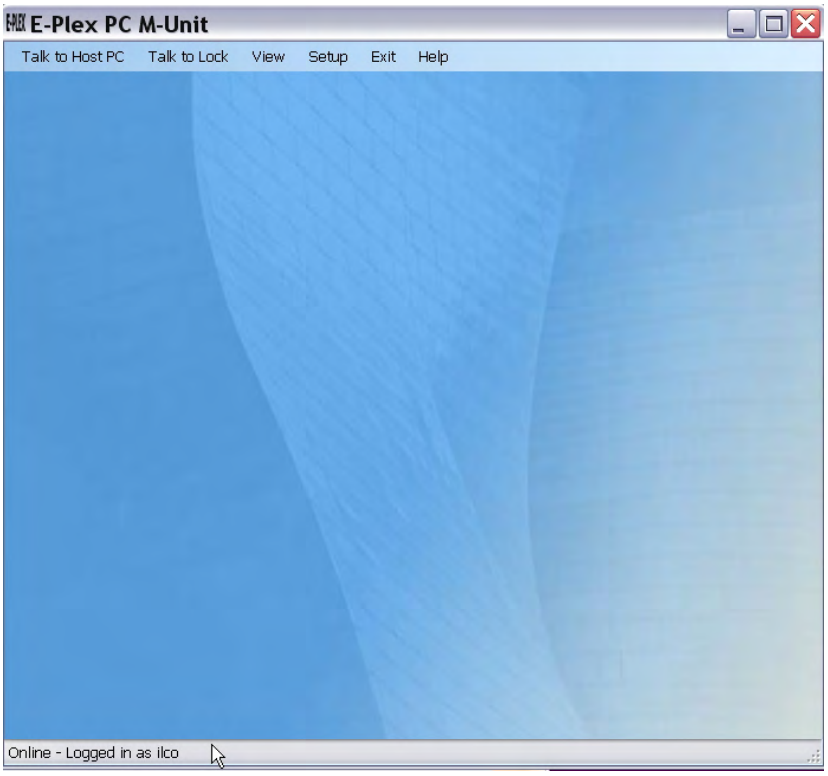
(ii) so as to program these locks,

(iii) audit each lock for event transactions,

(iv) then upload the audited info back to the Host PC to view/print them under the Enterprise Reports menu, and/or

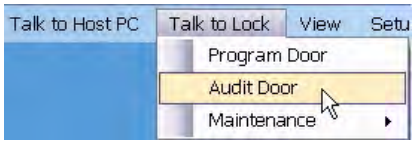
(v) perform lock diagnostics.

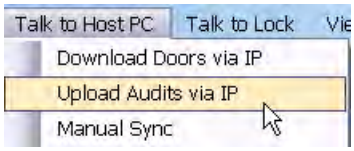
Note: Whenever you need to "talk" (communicate) to the E-Plex lock, you must use Kaba's IrDA communications (PC M-Unit) kit -> the IrDA dongle and its cable.



From this point on, please refer to the ***E-Plex PC M-Unit User Guide*** on how to perform the data transfer to perform the above tasks in more details. The E-Plex PC M-Unit user guide is included as an electronic document on the USB flash drive of the ***E-Plex PC M-Unit kit***.

The following are a few sample screens showing the PC M-Unit sub-menus from where you will launch the above five -> (i) through (v) tasks.





6 Appendix

Appendix: Software Installation

This section describes the complete software installation process including the software registration and activation process.

Note 1: The software installation procedure described here is for a **"Standalone" Express** installation with minimal user interaction. All software modules will be installed on a Standalone single PC where it will automatically install the Server and the Client components of the software and also the PC M-Unit software.

You may also select the **"Network" Custom** Install option if you are installing software on separate Server and Client PCs in a networked environment. In this case, you must follow the correct order/sequence of installation which is described in the (Software) ***"Installation Procedure"*** document shown on the software CD main menu.

Note 2: During the *Standalone / Express* install option, the installation software will also install the *PC M-Unit* program on the same PC. At the end of installation you will have the Server, Client and M-Unit software components, all installed on one PC for convenience.

If you prefer, you can install the PC M-Unit software only, on a separate Windows OS (Home Edition or higher) compliant portable **mini Laptop or Netbook PC.** In any case, when you want to program and/or audit the locks, you must use Kaba's IrDA Communications adapter kit that comes with the *E-Plex PC M-Unit kit*.

Software Registration and Licensing

Kaba Access Control's E-Plex Enterprise software requires you to register your individually licensed copy of the software with Kaba Access Control in order to use the software. Registering the software will help secure your system database and the locks on your site and will also aid Kaba Access Control in making you aware of any new software upgrades, patches, etc. when required.

On the CD envelope of the E-Plex Enterprise software CD, you will see a sticker with a unique 6-digit *Serial Number* for the software which is part of your unique 10-digit *Site License Number*. Additionally, the second line of the label on the CD jewel case will be titled "*Site Private ID*" with a blank space against it. For easy reference, you can write down this 8-digit software security key (number) that you will be asked to enter when you login to the software system the very first time. This key is used in the system as part of a unique encryption key for your facility and can also be accessed from the "System Setup" menu.

The 10-digit unique Site License number contains your:

(i) **Serial number** (6 digits, always unique),

(ii) **Software Type** (1 digit: "1"= Full Featured version, ie., Not a Trial version),

(iii) **Number of Seats** (2 digits: "25"= Unlimited). and

(iv) Software Product (1 digit: "1" = E-Plex Enterprise).

You will be required to enter the above digits of your Site License number which is printed on the sticker of the software CD envelope. (*Note:* The very last digit "1" for "Software Product" is not required to be entered),

The following are a few examples of End Users' Site License number that you must enter to register the software. Note that only your 6-digit Serial number is unique; you must enter the "Software Type" as always "1" and the "Number of Seats" as always "25", as shown on the software CD envelope sticker.

112233 – 1 – 25

223344 – 1 – 25

334455 – 1 – 25

The registration process is quite simple, and you can register the software in one of two ways:

Register online at Kaba Access Control's software registration website, anytime of the day or night (24/7), or

Register by calling our Technical Support line at 800-849-8324 or 336-735-1331, Monday through Friday between 8:00 AM and 5:00 PM Eastern Standard Time.

Important: *You will not be able to install the software if you do not complete the registration process with Kaba Access Control.*

Software Registration

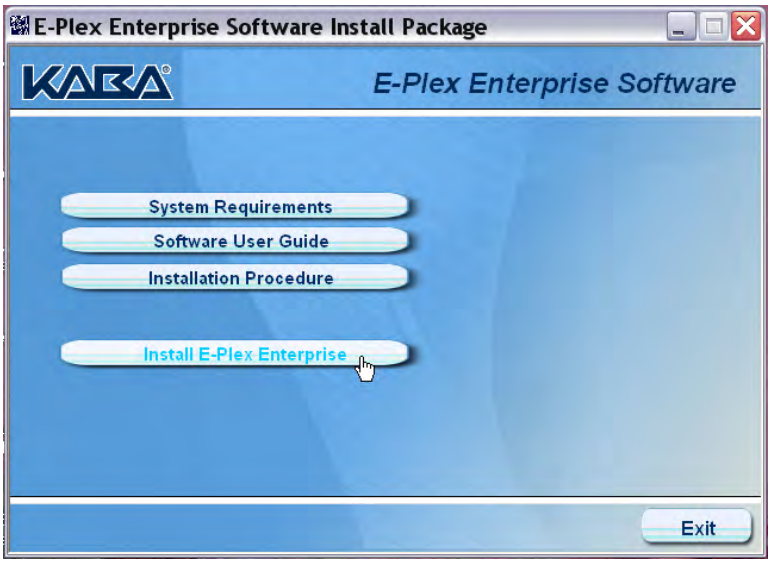
Complete the following steps to register the software:

- Insert the E-Plex Enterprise Installation CD into the appropriate drive of the PC.
- The E-Plex Enterprise Software Installation Browser loads and displays the **E-Plex Enterprise Software** browser menu.

- The **System Requirements, Software User Guide** and the **Installation Procedure** documents are provided on the install CD for your reference. There are two software installation options available: (i) For most cases where everything will be run from one PC, select the ***"E-Plex Enterprise for Standalone" (Express)*** **install** option. (ii) If you are going to be using separate Server PC and many different Client PCs in a networked environment, select the **"E-Plex Enterprise for Network" (Custom) install** option.

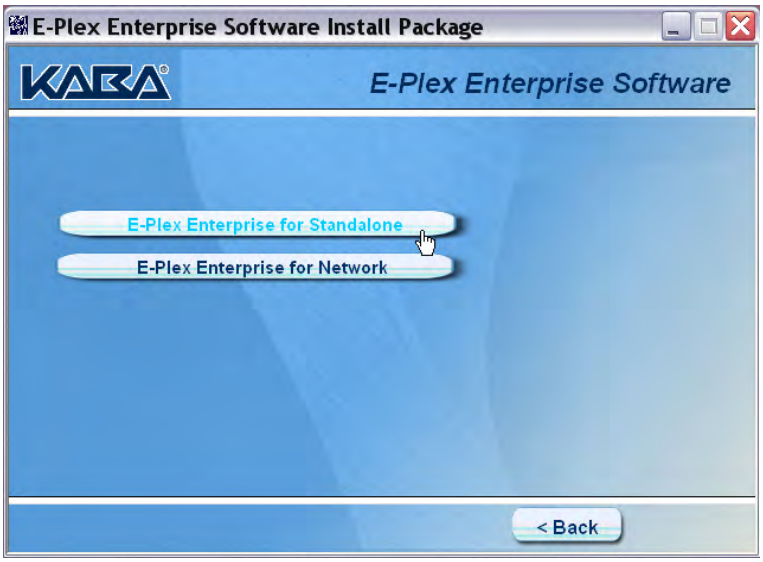
- ***Important:*** If you selected Network / Custom install option, you must follow the exact sequence of Server and Client parts of the software modules installation in Custom / Network install environment as described in the (Software) **Installation Procedure** document included on the software install CD.
  Please consult with your IT department personnel for Network install authorization rules, SQL related info, firewall restrictions etc that apply to your situation. All this must be sorted out before installing the E-Plex Enterprise software for a successful Network install environment.

Note: The software registration process occurs at the very beginning of the installation, both for the Standalone Express install and for the Network Custom install; when doing a Network install, the software registration will be done only on the Server software install phase (and not during Client(s) part of the software install) .



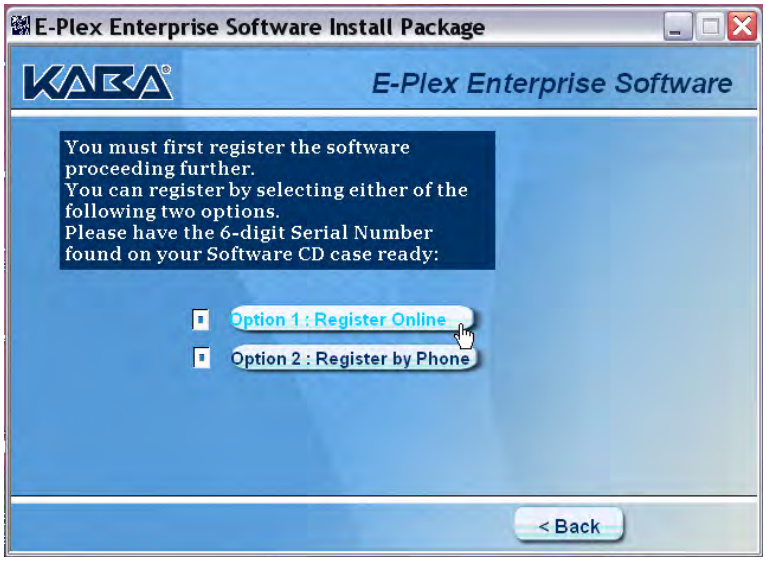
Option 1: Standalone / Express Installation:

- ***The software install section here is for the Standalone Express install option, starting with the software registration process.***



Note: You may also have a third option for “Upgrade”. That is, if you already have the previous Enterprise software Version 1 (1.2.0.7) installed on your PC, you simply click on the “Upgrade” option. Your current Version 1 software will be automatically upgraded to the new Version 2 software maintaining your existing database. For further info on upgrading your current software version to the newer software version, please contact Kaba’s Technical Support team.

- The system displays the following screen, which prompts you to choose one of the two options to register your software – (i) either through Kaba Access Control's dedicated website, or (ii) by calling Kaba Access Control's Technical Support phone line, as shown below:


E-Plex Enterprise Software Install Package
KABA
E-Plex Enterprise Software
You must first register the software proceeding further.
You can register by selecting either of the following two options.
Please have the 6-digit Serial Number found on your Software CD case ready:
Option 1 : Register Online
Option 2 : Register by Phone
< Back

If you click **Option1: Register Online**, proceed to the next step. If you click **Option 2: Register by Phone**, proceed to *Page 6-9* **"Option 2. Registering by Phone…".**

(Registration) Option 1: Registering Through Kaba Access Control's Website

- This action assumes that your PC can connect to the Internet. When you select this option, the system displays the following screen directing you to Kaba Access Control's software registration website:

E-Plex Enterprise Software Install Package
KABA
E-Plex Enterprise Software
You are about to register Kaba's E-Plex Enterprise Software Online.
Clicking on the link below will take you to Kaba's product software registration website where you must:
*Fill your contact information
*Type in your 6-digit Serial number
*Receive your unique 8-digit Validation Key (number)
Kaba Software Registration Website
Click on the "Continue installation" button to start the installation.
You will be prompted to enter the 6-digit Serial number and the 8-digit Validation key to proceed the installation.
Continue installation
< Back

- Click the **Kaba Software Registration Website** link first. The system opens your default Web browser to the **Kaba Access Control Software Registration** page.

- Select the **E-Plex Enterprise** Software Registration option. The system opens the **E-Plex Enterprise Software Registration** page.

KABA
E-Plex Enterprise Software Registration
Thank you for purchasing our product. Please choose the appropriate option below:
I am registering my product for the first time.
I am already registered but lost my product Registration / Activation key.

Click on **Registering my product for the First time** option.

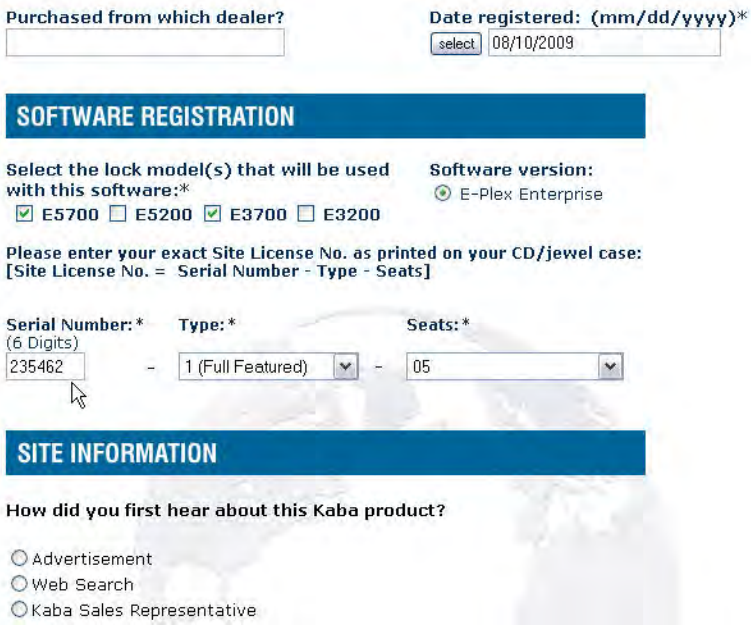
Note: If you had already registered in the past and want to just retrieve your original registration/activation key from Kaba Access Control, proceed to *Page 6-9,* "**Lost Registration/Activation Key".**

Registering for the First Time:

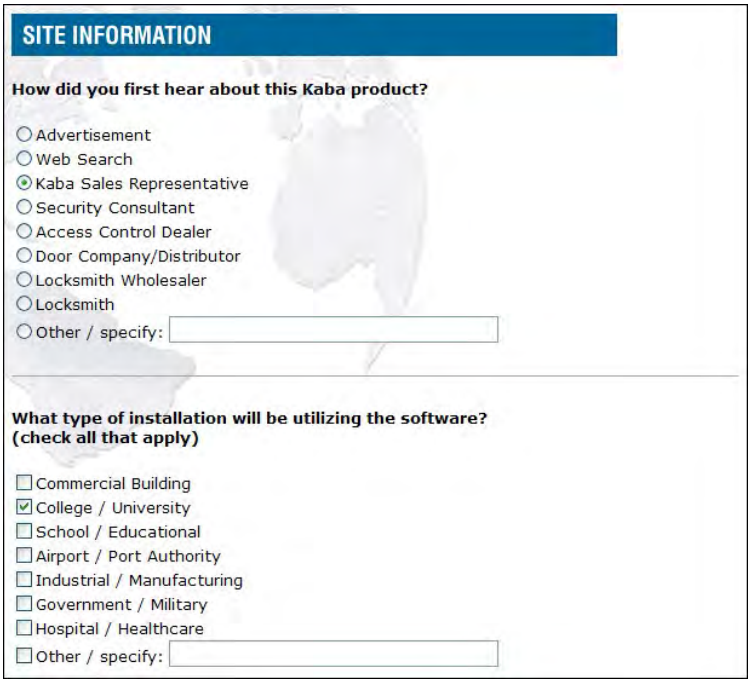
- If you are registering your software for the first time, select the first (Green) option. The system displays the **E-Plex Enterprise Software Registration** page.

E-Plex Enterprise Software Registration
Thank you for purchasing our product. To activate your lock, please fill out this form to receive your registration key.
Please note that any information you submit to us will be kept strictly confidential and will not be shared with any other company.
* required fields
CONTACT INFORMATION
Tuesday, June 23, 2009
First Name*
Last Name:*
Company/Organization:*
Title/Position:
Address:*
City:*
State/Province:*
Select State / Province
Zip/Postal Code:
Country:*
Select Country
Phone Number:*
Fax Number:
Email address:*
Email address again to confirm:*

- Complete the fields of the **Contact Information** area. Fields followed by an asterisk (*****) are required.
- Complete the fields of the **Software Registration** area. Your Serial Number, Software Type and the Number of Seats info are located on the sticker on your software CD jewel case. Also, select the E-Plex lock model(s) you will be using this software version.

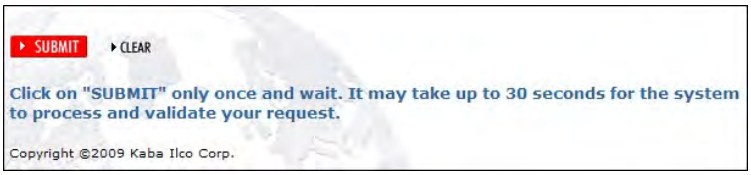


- Complete the fields of the **Site Information** area if you choose to provide additional information to Kaba Access Control. A sample of some of the fields is shown below.

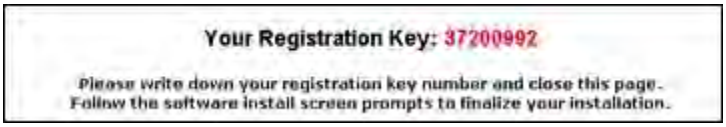


Note: *Information submitted is kept private and used only by Kaba Access Control for informational purposes.*

- When you have completed the registration, click **Submit**.


SUBMIT
CLEAR
Click on "SUBMIT" only once and wait. It may take up to 30 seconds for the system to process and validate your request.
Copyright ©2009 Kaba Ilco Corp.

The system will automatically generate your unique 8-digit **Registration/Activation Key** based on your input:


Your Registration Key: 37200992
Please write down your registration key number and close this page.
Follow the software install screen prompts to finalize your installation.

- Complete the registration process by clicking on the tab ***Continue Installation*** as shown on *Page 6-6*.
- You will be asked to enter your Serial number again along with your Registration /Activation key you just received to complete the registration and activation of the software. Proceed to *Error! Reference source not found.* on *Page 6-12*.

Lost Registration/Activation Key:

- If you had lost your registration key and need it for re-installation of the previously registered software, select the second (Red border) option. The system displays the **Registration/Activation Key Retrieval** screen.

KABA
E-Plex Enterprise Software Registration
Registration / Activation Key Retrieval
If you lost your registration / activation key, the system can send it to the original email account that was used to register your product.
If you do not remember the email address you used when you registered your product, please call Kaba's technical support phone line at 1-800-849-8324 or 1-336-725-1331 between 8:00am and 5:00pm, monday through friday (except holidays), Eastern Standard Time.
Email Address:
jthomas@kws.kaba.com
SEND REGISTRATION KEY

- Type your **Email Address** in the field and click **Send Registration/Activation Key**.

  You will receive a separate e-mail from Kaba Access Control with your Registration Key.

E-Plex Enterprise Registration / Activation Key Retrieval
KabaAccessControl to jthomas
From <KabaAccessControl@kaa.kaba.com>
To <jthomas@kws.kaba.com>
E-Plex Enterprise Software Registration
Registration / Activation Key Retrieval - CONFIDENTIAL
This is an automated message. Do not reply.
Your Registration / Activation Key: 18057364

- Write your Registration key down and close the window. This number will be used to re-activate your software. On the **Install E-Plex Enterprise Access Control Software** screen, click **Continue Installation** tab on the screen to complete the software registration process.

  You will be asked to enter your Serial number again along with the Registration / Activation key you received to complete the installation.

Proceed to *Error! Reference source not found.* on *Page 6-12* in this chapter.

(Registration) Option 2: Registering by Phoning Kaba Access Control's Technical Support

- Click to select this option.

E-Plex Enterprise Software Install Package
KABA
E-Plex Enterprise Software
You must first register the software proceeding further.
You can register by selecting either of the following two options.
Please have the 6-digit Serial Number found on your Software CD case ready:
Option 1 : Register Online
Option 2 : Register by Phone
< Back

- The system displays the following screen:

E-Plex Enterprise Software Install Package
KABA
E-Plex Enterprise Software
You are registering Kaba's E-Plex Enterprise Software by Phone.
Please call Kaba's Technical Support phone line at 800-849-8324 or 336-725-1331 between 8:00 PM and 5 PM, Monday through Friday (except holidays), Eastern Standard Time.
*Give your contact information
*Give your 6-digit Serial number
*Receive your unique 8-digit Validation Key (number)
Click on the "Continue installation" button to start the installation.
You will be prompted to enter the 6-digit Serial number and the 8-digit Validation key to proceed the installation.
Continue installation
< Back

- Follow the instructions on the screen to register by calling Kaba Access Control's Technical Support line.
- Kaba Access Control's Technical Support personnel will first register your contact info, Serial Number, Type of Software info and the Number of Seats info for your software (from your software CD jewel case sticker), and will then give you a unique 8-digit **Registration/Activation Key** for your software over the phone.
- Write your Registration key down and click ***Continue Installation*** tab at the bottom left of the screen to complete the software registration process.

  You will be asked to enter your Serial number again along with your Registration /Activation key you just received to complete the registration and activation of the software. Proceed to *Error! Reference source not found.* below.

Continue with Registration

Complete the following steps to finish registering the E-Plex Enterprise Software.

- Click Continue Installation on the Install E-Plex Enterprise Access Control Software screen.
- The system displays the **Enter Registration Information** screen.

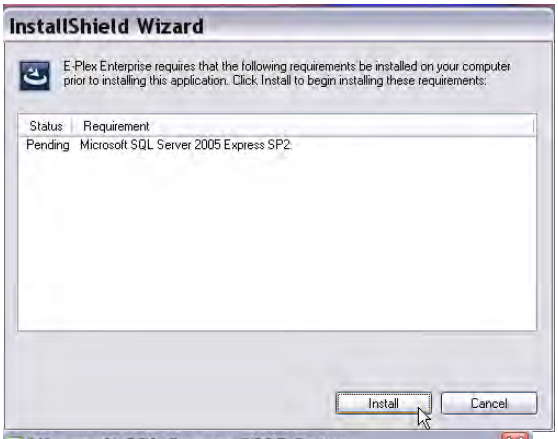
- Complete the **Enter Serial number** and **Enter Registration key** fields.
- Click **OK**. The system congratulates you for successful registration with Kaba.

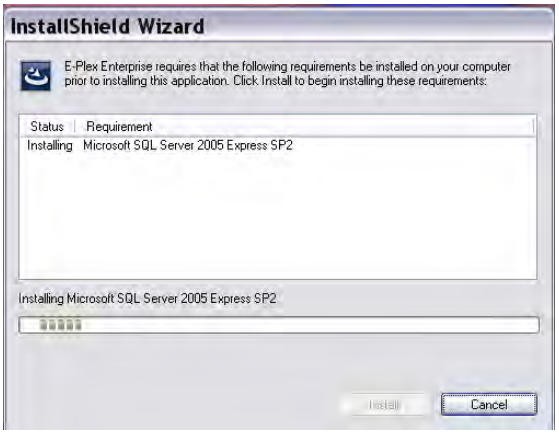
E-Plex Enterprise - InstallShield Wizard
Preparing Setup
Please wait while the InstallShield Wizard prepares the setup.
E-Plex Enterprise Setup is preparing the InstallShield Wizard, which will guide you through the rest of the setup process. Please wait.
E-Plex Enterprise
Congratulations, you have successfully registered this product.
OK
InstallShield

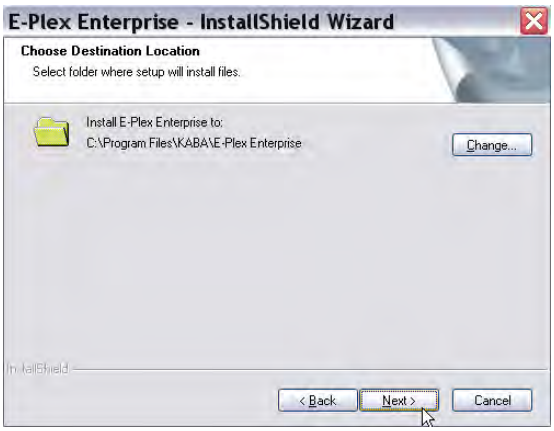
- Click **OK** and proceed to the rest of the installation of the E-Plex Enterprise software which will be the actual installation of the E-Plex Enterprise Server, Client and PC M-Unit software modules.

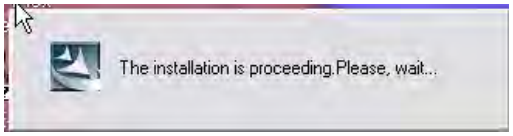
(Rest of the) Software Installation

- After the registration of the software, the (Standalone/Express) installation will continue automatically until done. It will install the Server and the Client modules first, followed by the M-Unit software on this same standalone PC.
- The following are a few sample screens of the rest of the software installation:


InstallShield Wizard
E-Plex Enterprise requires that the following requirements be installed on your computer prior to installing this application. Click Install to begin installing these requirements:
Status
Requirement
Pending
Microsoft SQL Server 2005 Express SP2
Install
Cancel


InstallShield Wizard
E-Plex Enterprise requires that the following requirements be installed on your computer prior to installing this application. Click Install to begin installing these requirements:
Status
Requirement
Installing
Microsoft SQL Server 2005 Express SP2
Installing Microsoft SQL Server 2005 Express SP2
Cancel





E-Plex Enterprise - InstallShield Wizard
InstallShield Wizard Complete
The InstallShield Wizard has successfully installed E-Plex Enterprise. Before you can use the program, you must restart your computer.
Yes, I want to restart my computer now.
No, I will restart my computer later.
Remove any disks from their drives, and then click Finish to complete setup.
< Back
Finish
Cancel

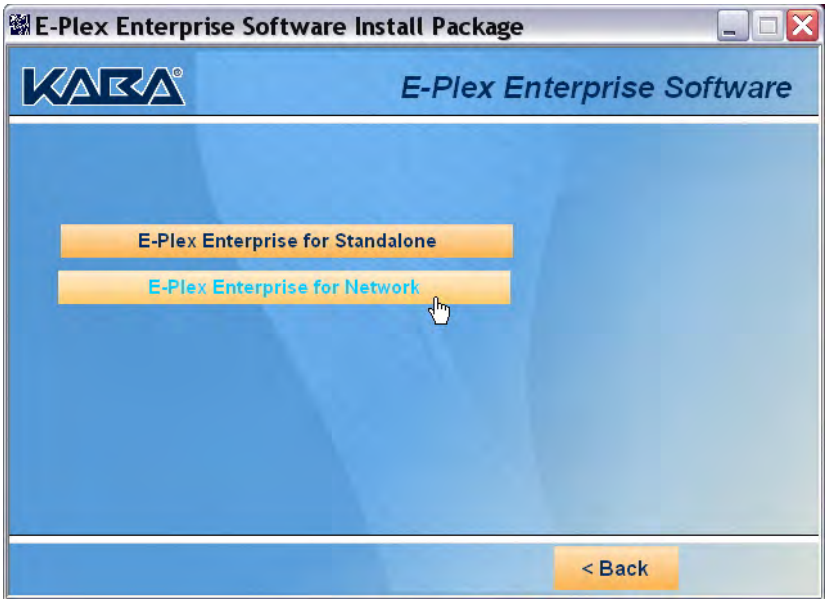
- **You must restart your computer to activate all the installation to take effect.**

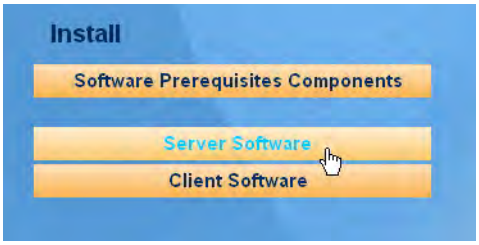
Option 2: Server/Client Networked Installation:

Important: Please consult with your IT personnel for network installation of the E-Plex Enterprise software involving a dedicated Server PC and other multiple Client PCs.

Install Server PC Pre-requisites & Server part of Software

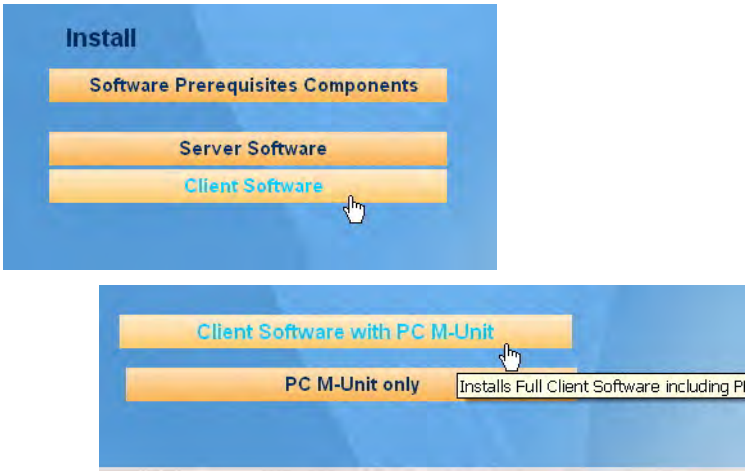
- From the E-Plex Enterprise software CD, install all network related E-Plex Enterprise Pre-requisites for the E-Plex Server and then install the Server part of the Enterprise software on the Server PC only. Follow the screen prompts and consult with your IT personnel for any network server related tweaking that affects your environment.



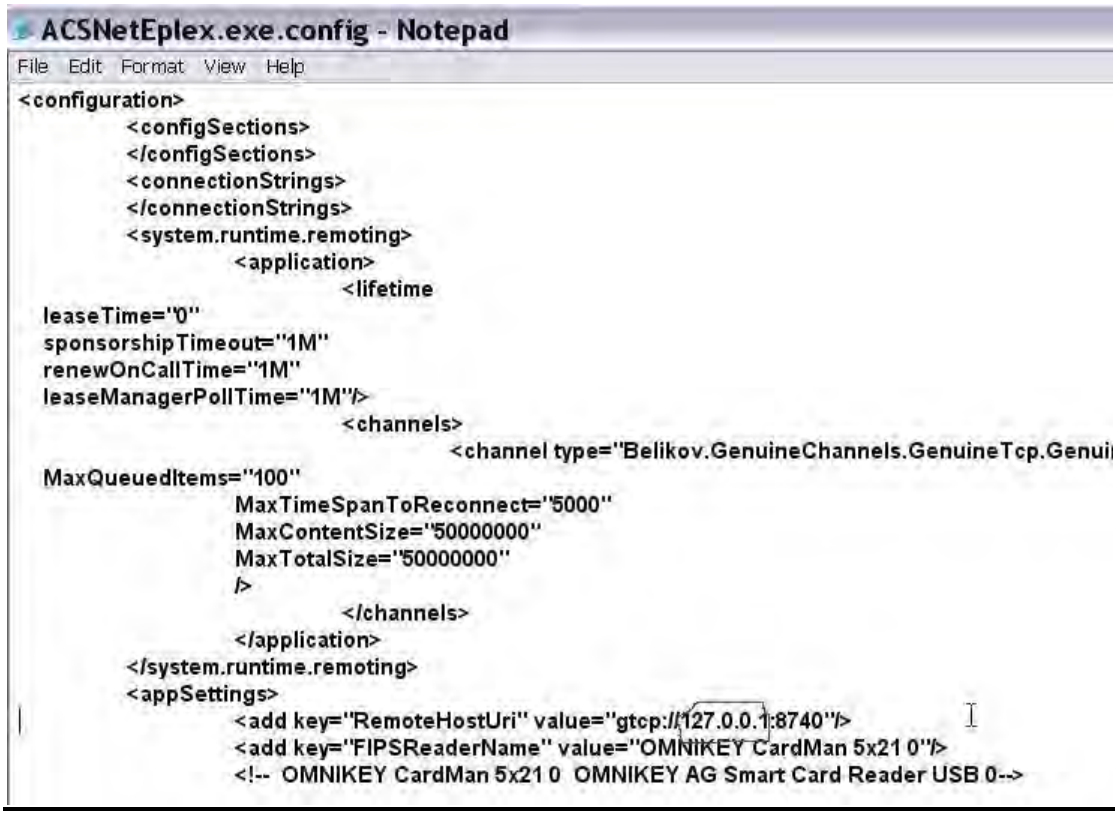


Install Client PC(s) Pre-requisites & Client & M-Unit parts of Software

- Now install all network related E-Plex Enterprise Pre-requisites for each Client PC and then install the Client part of the Enterprise software on each Client PC.
- The Client part of the software will also automatically install the PC M-Unit part of the software. If required, you may want to install the PC M-Unit part of the software only on a separate Netbook PC to carry it around to program & audit locks.



- Assuming that you installed the Client part of the software in the default path of the Client PC which is, "***C:\Program Files\Kaba\E-Plex Enterprise\Main Client***", go to this directory and open the configuration file "***ACSNetEplex.exe.config***" with the Notepad.
- By default, each E-Plex Enterprise Client PC's configuration file IP address will point to "127.0.0.1" as the remote Host's (Server PC's) IP address. You must edit this text file using a text editor such as "Notepad" and replace this default IP address with the actual Server PC's IP address.
- Replace the default IP address value "127.0.0.1" of "RemoteHostUri" with the actual IP address value, such as "10.106.15.44" (example IP address only). Save the file and close. Repeat this for each Client PC in your facility.
- The following screen shot shows where exactly should this IP address value be replaced in the Client configuration file of each Client PC.



- All parts of the software installation are now complete – whether your software installation was on an Express install on one Standalone PC, or was a Network install on a Server PC and one or more Client PCs.
- You must restart your PCs and after that you should be ready to launch and use the E-Plex Enterprise software by clicking the ***E-Plex Enterprise Client*** icon from your Host PC (Client) desktop.

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- **Please go back to the Chapter, "2. Getting Started".**
- **In this Chapter, resume from the Section, "Quick Start Tips"** on *Page 2-3***.**

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